

Financial App Form

Page 1

Name: Eleanor O'Neil

Name of the nursing home: Massena Rehab and Nursing

Date Of Birth: 1937-10-19

Your Home Address

Street Address: 2292 State Highway 310

Address Line 2:

City: Madrid

State/Region/Province: NY

home_postal_zipcode: 13660

Spouse

spouse info: yes

Demographics

you selected: Filed taxes in the past 4 years

Employment status: retired

Real Estate and Vechicles your home info within the past 5 years

Currently own: Yes

equity value of your home: 87000

your monthly bill: 25.00

Own vehicle sell info in past 5 years

Make and Model: Chevy Equinox

Fair market Value: 21000

Insurance Info

Name of Homeowners insurance:

Have Medicare: Yes

Have Medicare Replacement (Like UHC Medicare): Yes

Life Insurance (including through an annuity): Yes

Medicare #: 8NC7W20QP61

Financial App Form

HMO Name and ID #: AARP Medicare Supplement Part C 048347242-1

Life Insurance provider: Prudential

Cash Value: 6715.00

Policy #: 64758387

Your Income Info Social Security

Name of payer: Eleanor O'Neil

Amount: 953.00

Frequency: Monthly

Pension

Name of payer:

Amount:

Frequency:

Pension

Name of payer:

Amount:

Frequency:

Annuity

Name of payer:

Amount:

Frequency:

IRA distribution

Name of payer:

Amount:

Frequency:

Stock Dividends

Name of payer:

Amount:

Frequency:

TRUST INFO

Financial App Form

Trust name: The Robert and Eleanor O'Neil Family Trust

Garantor: Robert and Eleanor

Trustee: Cynthia Hope, Brenda McCall

Amount: 87000

Spouse Income Info Social Security

Name of payer: Robert O'Neil

Amount: 2584

Frequency: Monthly

Pension

Name of payer: Mass Mutual

Amount: 1228

Frequency: Monthly

Pension

Name of payer: Met Life

Amount: 833

Frequency: Monthly

Annuity

Name of payer:

Amount:

Frequency:

IRA distribution

Name of payer:

Amount:

Frequency:

Stock Dividends

Name of payer:

Amount:

Frequency:

TRUST INFO

Financial App Form

Trust name:

Garantor:

Trustee:

Amount:

Your Investments Stocks

Company Name:

Approx. Value:

Bonds

Company Name:

Approx. Value:

Annuity

Company Name:

Approx. Value:

IRA

Company Name: Janus Henderson (Roth IRA)

Approx. Value: 31,579.64

Spouse Investments Stocks

Company Name:

Approx. Value:

Bonds

Company Name:

Approx. Value:

Annuity

Company Name:

Approx. Value:

IRA

Company Name: Janus Henderson (Roth IRA)

Approx. Value: 31,579.64

Financial App Form

Banking info

Bank #1

Bank: Community Bank NA

Account #: 42012428

\$ Amount: 15014.00

bank_1_date_closed:

Bank #2

Bank: Community Bank NA

Account #: 49027014

\$ Amount: 15875.00

bank_1_date_closed:

Bank #3

Bank: Pentagon Federal Credit Union

Account #: 2363289-01-4

\$ Amount: 2600.00

bank_1_date_closed:

Spouse Info

Name: Robert O'Neil

Spouse SS#: 132-28-3493

Spouse DOB: 1936-06-01

Best Contact

Name: Cynthia Hope

Email: caohope@aol.com
