Financial App Form

Page 1

Name: Gerald Howley

Name of the nursing home: Massena Rehab and Nursing

Date Of Birth: 1946-07-03

Your Home Address

Street Address: 128 JEFFERSON AVE

Address Line 2:

City: Massena

State/Region/Province: NY

home_postal_zipcode: 13662

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: $70,000

your monthly bill: $75.00 approx.

Own vehicle sell info in past 5 years

Make and Model: Seebring

Fair market Value: $1,000

Insurance Info

Name of Homeowners insurance: Yes

Have Medicare: Yes

Have Medicare Replacement (Like UHC Medicare): Yes

Medicare #:

Your Income Info
Social Security

Financial App Form

Name of payer: $1,200

Amount:

Frequency:

Pension

Name of payer: Town of Massena

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

Trust name:

Garantor:

Trustee:

Amount:

Spouse Income Info
Social Security

Financial App Form

Name of payer: $2,000 approx

Amount:

Frequency:

Pension

Name of payer: $2,000

Amount:

Frequency:

Pension

Name of payer:

Amount:

Frequency:

Annuity

Name of payer: $1,000

Amount:

Frequency:

IRA distribution

Name of payer:

Amount:

Frequency:

Stock Dividends

Name of payer:

Amount:

Frequency:

TRUST INFO

Trust name:

Garantor:

Trustee:

Amount:

Your Investments
Stocks

Financial App Form

Company Name:

Approx. Value:

Bonds

Company Name:

Approx. Value:

Annuity

Company Name:

Approx. Value:

IRA

Company Name:

Approx. Value:

Spouse Investments
Stocks

Company Name:

Approx. Value:

Bonds

Company Name:

Approx. Value:

Annuity

Company Name:

Approx. Value:

IRA

Company Name:

Approx. Value:

Banking info
Bank #1

Bank: Twin Rivers Federal Credit Union

Account #:

$ Amount: $1,200.00

bank_1_date_closed:

Financial App Form

Bank #2

Bank:

Account #:

$ Amount:

bank_1_date_closed:

Bank #3

Bank:

Account #:

$ Amount:

bank_1_date_closed:

Spouse Info

Name: Susan Howley

Spouse SS#:

Spouse DOB:

Best Contact

Name: Susan Howley

Email: