

# Financial App Form

## Page 1

**Name:** James Markley

**Name of the nursing home:** Auburn Rehabilitation and Nursing Center

**Date Of Birth:** 1978-05-04

**What is your Medicaid ID #:** AG07695Z

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### Your Home Address

**Street Address:** 94 Saint Joseph Ave

**Address Line 2:**

**City:** Buffalo

**State/Region/Province:** NY

**home\_postal\_zipcode:** 14211

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### Address

**Street Address:** 170 Murray St

**Address Line 2:**

**City:** Auburn

**State/Region/Province:** NY

**home\_postal\_zipcode:** 13021

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### Spouse

**spouse info:** Never married

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### Demographics

**you selected:**

**Employment status:** unemployed

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

**Renting:** Yes

**Rent:** 1388.00

**your monthly bill:** N/A

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### Insurance Info

**Name of Homeowners insurance:**

# Financial App Form

**Have Medicare:** Yes

**Have Medicare Replacement (Like UHC Medicare):** Yes

**Medicare #:** 6KV0FV1JJ02

## Your Income Info Social Security

**Name of payer:** SSA

**Amount:** 1646.00

**Frequency:** Month

## 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

**Trust name:**

# Financial App Form

**Garantor:**

**Trustee:**

**Amount:**

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## **Your Investments Stocks**

**Company Name:**

**Approx. Value:**

## **Bonds**

**Company Name:**

**Approx. Value:**

## **Annuity**

**Company Name:**

**Approx. Value:**

## **IRA**

**Company Name:**

**Approx. Value:**

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## **Banking info Bank #1**

**Bank:** M&T Bank

**Account #:**

**\$ Amount:** 2000.00

**bank\_1\_date\_closed:**

## **Bank #2**

**Bank:**

**Account #:**

**\$ Amount:**

**bank\_1\_date\_closed:**

## **Bank #3**

**Bank:**

**Account #:**

# Financial App Form

**\$ Amount:**

**bank\_1\_date\_closed:**

**Best Contact**

**Name:** James Markley

**Email:** markleyjames53@gmail.com