



CONFIDENTIAL FINANCIAL DISCLOSURE INFORMATION

Team: 1 2A 2B Prospect: _____ Male Female

Home Phone: _____ Cell Phone: _____ Marital Status: _____

DOB: _____ SSN: _____ Medicare: A B D

Medicare #: _____ Secondary Ins: _____

Medicaid #: _____ SSI: _____ Spend down: _____

Veteran: _____ LTC Ins: _____ Comp Case: Y / N

Prescription Plan: _____ How long have you lived in Onondaga County? _____

Pharmacy Name/Phone: _____ - Retail / Mail Order

Spouse Name: _____ Spouse DOB: _____ Spouse SSN: _____

Contact Name/Address: _____

Relationship to Prospect: _____ Home Phone: _____ Cell Phone: _____

<u>Cur Mo Income:</u>	<u>Applicant:</u>	<u>Spouse:</u>	<u>Expenses:</u>	
Social Security	\$ _____	\$ _____	Rent	\$ _____
SSI	\$ _____	\$ _____	Medical Bills	\$ _____
Veteran's Pension	\$ _____	\$ _____	Supplemental Ins	\$ _____
Railroad Pension	\$ _____	\$ _____	EPIC	\$ _____
Other Pension	\$ _____	\$ _____	Food	\$ _____
Dividends	\$ _____	\$ _____	National Grid	\$ _____
Annuity	\$ _____	\$ _____	Telephone	\$ _____
Trust	\$ _____	\$ _____	Cable Television	\$ _____
Other Income	\$ _____	\$ _____	Credit Card Debt	\$ _____
			Taxes	\$ _____
			Loan Payments	\$ _____
TOTALS:	\$ _____	\$ _____		\$ _____

Total Cur Mo Income of Applicant/Spouse combined: \$ _____

<u>Type of Accounts:</u>	<u>Balance:</u>	<u>Life Insurance Type:</u>
Checking	\$ _____	Group life policy: _____ (no cash value)
Bank: _____		Company: _____
Savings	\$ _____	Term life policy: _____ (no cash value)
Bank: _____		Company: _____
CD	\$ _____	Whole life policy: _____ (some cash value)
Money Market	\$ _____	Company: _____
Mutual Funds	\$ _____	Face value: \$ _____ Cash value: \$ _____
Stocks	\$ _____	Estate Trusts: Y / N \$ _____
Bonds	\$ _____	Owns Home: Y / N \$ _____
IRA	\$ _____	Owns Other Property: Y / N \$ _____
Annuities	\$ _____	Holds Mortgage on Property: Y / N \$ _____
Other	\$ _____	Rental Income: Y / N \$ _____

Vehicle: _____

Transfers (last 5 years): Property: Y / N House: Y / N Assets: Y / N

Attorney: _____

Any pending lawsuit settlements? Y / N **Irrevocable Trust?** Y / N

Burial arrangements? Y / N Cemetery: _____

Funeral Home: _____