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Personal Reports

Residence:

Type:



Picture:

Service Provider Name	Type of Service	Account#	Main Phone #	Website
Abarb Pest Control	Pest Control	3444	(732) 567-9999	www.abarb.com
AT&T Wireless	Cellphone	3845000	(800) 331-0500	www.att.com
PSE&G	Utilities	1234567	(800) 436-7734	www.pseg.com
Risko Security Systems	Alarm Co.	223	(248) 850-2938	www.risko.com
Verizon FIOS	TV, Internet, Phone	3949587	(800) 688-2880	www.verizon fios.com
Washtenaw & Sussex Irrigation	Inground Sprinklers	CC2039	(973) 628-7077	www.mcibici.com

Residence:

Type:



Picture:

Service Provider Name	Type of Service	Account#	Main Phone #	Website
Betty Homemaker	Housekeeper		(418) 325-9876	
Bob Snow	Snow Plowing		(723) 325-3977	
DirecTV	TV, Internet	20495	(877) 355-7530	www.directv.com
Harrison's	Fuel & Hardware	CJR2039	(733) 325-6700	www.harrisons.com
Mountaintop Landscaping	Landscaping		(723) 325-3200	www.mountaintop.com
Orkin	Pest Control		(723) 522-7491	www.orkin.com
Tim Homer	Home Repairs		(723) 697-9315	

Pet Name: Maxwell
Pet Type: Dog **Pet Address:** 1605 Washtenaw Avenue Ann Arbor MI
Pet Breed: American Eskimo **Color:** white
Pet Birthdate: 1/28/1996 **Weight:** 22
Adoption Date: **Date of Death:**
Adopted From: DebbieGayle **Cause of Death:**
Sex: Male **Notes:** Blind as a bat! Approach with caution!
Neutered:


Immunizations:

<u>Immunization</u>	<u>Immunization Date</u>	<u>Immunization Exp Date</u>	<u>Notes</u>
Coronavirus	4/21/2008	4/10/2025	slight reaction
Bordetella	4/21/2008	10/18/2008	
Rabies - 2 year	5/14/2007	5/13/2009	ask about 5 year shot

Medical History:

<u>Pet Diagnosis</u>	<u>Diagnosis Date</u>	<u>Special Food or Medication</u>	<u>Frequency of Medication</u>	<u>Notes</u>
Arthritis	6/12/2006	Dasequin, 1/2 tab	in a.m.	
Retinal Degeneration	4/15/2004			98% blind
Temper		Clomipramine, 25mg	2x daily	

Veterinary Practice: Ann Arbor Animal Clinic **Veterinary Phone:** 248-447-6000 **Website:**

Addresses

<u>Address 1</u>	<u>Address 2</u>	<u>City</u>	<u>State/Prov</u>	<u>Country</u>	<u>Zip Code</u>	<u>Phone No</u>	<u>Phone Type</u>	<u>Address Name</u>
320 E. Liberty Street		Ann Arbor	MI		48104	(248) 447-6000	Work Phone	AAAC

Contacts

<u>Contact Name</u>	<u>Email</u>	<u>Phone Number</u>	<u>Type</u>
Dr. Dean J. Terf DVM PA	dterf@aaah.com	(248) 996-4000	Work Phone

Colleen R. Carebinder

1605 Washtenaw Avenue * Ann Arbor, MI 48104
Home Phone: (248) 437-4076 Cell: (908) 777-6666 x 233
ccarebinder@carebinders.com

Executive Management; Manager, Director, COO
Operations Management, Client Services, Program Management

Visionary, hands-on executive leader with extensive experience in operations management, organizational development, program management, sales and marketing and solution delivery for a variety of firms. Strongest skillset comes from determining a need to creating a solution for that need through team building, staff management, policy and procedures development, problem resolution, operational risk assessment, management and monitoring, client relationships and marketing, using innovative market solutions. Focus-driven leader able to successfully orchestrate complex client and employee relationships and work environments, fueling greater partner loyalty and fewer channel conflicts. Seeking a challenging position, temporary or permanent, that needs my unique skillset to augment or help grow a firm's business.

Professional Experience

Founder/CEO
Associates TLC, LLC, Hudson, NY
2/1/2005 - Present

ATLC consults to and provides training for firms in the investment industry, focusing on industry overviews, fund accounting, operational due diligence and project management.

CEO
CareBinders LLC, Ridgewood, NJ
10/17/2008 - Present

Software firm that offers data vault and data locator software for families and trusted advisors. Written in Access 2007 runtime, secure offline repository for all personal information, family member by family member. Hundreds of reports for personal, m

President, Innovative Operating U
Moonbeam Corporation, ,
11/2/2002 - 12/13/2004

Senior most officer in unit, responsible for day-to-day operations of the Innovative product, a Microsoft based investor accounting software product that was the outgrowth of Stronghold Management Systems, which was acquired by Moonbeam.

Founder/CEO
Stronghold Management Systems, Inc., ,
5/1/1991 - 11/2/2002
Created and designed web-based investor accounting software for alternatives industry.
Grew firm from 1 person to 25 and oversaw complete operation.

Education

University of Michigan, Ann Arbor, MI
9/1/1990 - 5/23/1991
Grad School, MS of Ed
9/1/1985 - 5/23/1988
College, BS of Ed

Medical Reports

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Name:	Colleen R. Carebinder		Gender:	Female	
Address:	1605 Washtenaw Avenue		Blood Type:	Don't Know	
City, State, Zip:	Ann Arbor, MI 48104		Rh Factor:	Negative	
Home Phone:	(248) 437-4076	W Phone:		Wears Contacts:	<input checked="" type="checkbox"/>
Cell Phone:	(908) 777-6666	SS#:	123-45-6789	Wears Glasses:	<input checked="" type="checkbox"/>
DOB:	6/15/1966	Age:	44	Has Dentures:	<input type="checkbox"/>
Place of Birth:	San Francisco, CA		Height:	5'2"	
Referring Doctor:			Weight:	NOYB	
Employer:	CareBinders LLC		Eye Color:	Blue	
Occupation:	Software Firm				

Picture of Client:



Medical Insurance

Insured Name:	Adam Paul Carebinder	Policy Group #:	83293856
Policy Name:	Oxford	Policy Carrier:	United Healthcare
Policy Type:	Health	Policy Agency:	United Healthcare
Policy Number:	203957	Policy Broker:	United Healthcare
Member ID:			

Attachment:



Allergies

Allergy Name	Allergy Type	Reaction Type	Date Diagnosed	Last Date Reacted	Medication Used	Notes
Arythromycine	Medication	hives				
Asprin	Medication	unknown			was part of Fiorenol reaction	
Pennicillin	Medication	unknown			none	fear of reaction due to other allergies
Sulfa	Medication	hives			possibly benadryl	

Immunizations

Immunization	Date	Drug Name	Where Administered	Administered By:	Effective Period	Reactions/Notes
Tetanus	2/2/2005		Doctor's office	Don Werstein		10 year
Chickenpox	1/5/1960		Doctor's office	Matty Feldman		

Pharmacies

Pharmacy	Pharmacy Address	Pharmacy Phone	Address Name
CVS	111 Stadium Boulevard Ann Arbor MI 48104	(723) 666-3232	CVSA2
Rite Aid	175 Rock Road Ann Arbor MI 48104	(723) 445-2857	RiteAid

Medications

Generic Name	Brand Name	Dosage	Frequency	Reason for Medication	Prescribed By	Dr. Phone	Date First Started
Diazepam	Valium	5mg	PRN	anxiety	Dr. Jonathan Heartfelt	212-456-7897	
Omeprazole	Nexium	40mg	1 each morning	acid reflux	Dr. Lloyd Werstein	(234) 686-4440	

Diagnoses

Visit ID	Symptom	Diagnosis	Doctor	Diagnosis Date	2nd Opinion of Visit
6	checkup	pronounced just fine	Dr. Wendy Welcome MD	8/31/2010	
3	Indigestion	Hiatal Hernia	Dr. Jonathan Heartfelt MD	7/16/2008	1

Medical Procedures

Medical Procedure	Procedure	DoctorName	Facility performed at	Appliance Installed	Reason for Procedure
D&C	4/14/1994	Sharon B Newborne MS, PA-C	University Hospital Medical Center		miscarriage
Birth	8/9/1981	Dr. Neeta Mammo MD	University Hospital Medical Center		Son Born!

Rx Appliances

Type	Prescribed By	Prescription Date	Notes
Contact Lenses	C.F. Eye Care		1.75 left, 4.0 right

Family History

Person	Type of disorder	Relationship	Age when diagnosed	Outcome	Tobacco Use	Alcohol Consumption
Carol R. CareBinder		self			Never	Socially
Notes:						
Charles J.	bladder cancer	father	71	ostomy - fine	1.5 packs/day	Occasionally
Notes:						
Claire Martinez	breast cancer	aunt	71	lumpectomy - fine	Never	Daily

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State/Prov: FL

Specialty	In Network	Doctor Name	Doctor Phone	Full Address	Practice
Cardiovascular Disease	<input checked="" type="checkbox"/>	Dr. Jonathan B. Heartfelt MD	Work Phone - 212-456-	15 Highway North Boca Raton FL	Boca Raton Medical Associates

State/Prov: MI

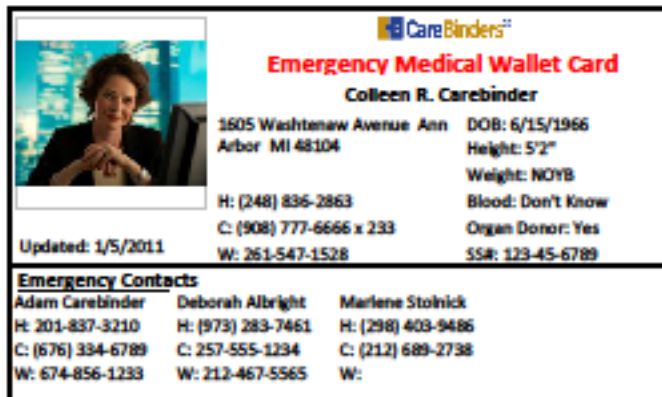
Specialty	In Network	Doctor Name	Doctor Phone	Full Address	Practice
General Practice	<input type="checkbox"/>	Dr. Lloyd D. Werstein MD	Main Phone - (234) 487-3355	15 Henderson Street Milan MI 48824	Internal Medical Associates
Radiology	<input type="checkbox"/>	Dr. Neeta Mammo MD	Main Phone - 234-686-4440	650 First Avenue 2nd Floor Ann Arbor MI 48104	Hill Street Radiology and Mammography
Obstetrics - Gynecology	<input type="checkbox"/>	Dr. Wendy R. Welcome MD	Main Phone - (273) 894-9599	370 Highland Avenue Suite 201 Saline MI 48223	Ann Arbor OB/GYN

State/Prov: NJ

Specialty	In Network	Doctor Name	Doctor Phone	Full Address	Practice
	<input type="checkbox"/>	Dr. Claire Martino MD	Work Phone - 201-546-2525	30 Prospect Hackensack NJ 7601	Pediatric Associates
Radiology	<input type="checkbox"/>	Dr. Jay Rollins MD	Work Phone - (203) 454-9891	30 Prospect Hackensack NJ 7601	Radiology Group
Obstetrics - Gynecology	<input type="checkbox"/>	Dr. Lara Biondo MD	Main Phone - 212-879-1232	30 Prospect Hackensack NJ 7601	OBGYN Associates

Front of Card

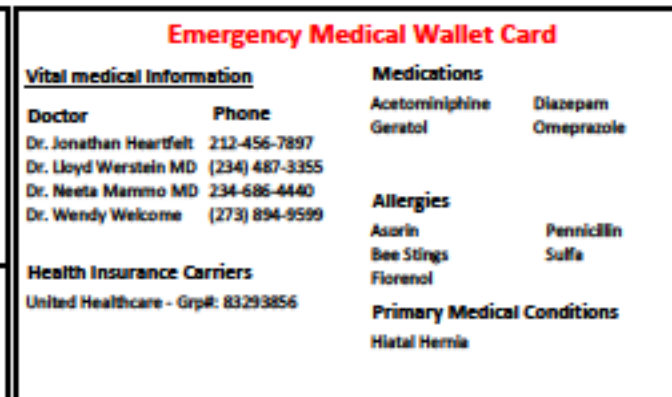
Back of Card



CareBinders
Emergency Medical Wallet Card
Colleen R. Carebinder
 1605 Washtenaw Avenue Ann Arbor MI 48104
 H: (248) 836-2863
 C: (908) 777-6666 x 233
 W: 261-547-1528
 Updated: 1/5/2011

DOB: 6/15/1966
 Height: 5'2"
 Weight: NOYB
 Blood: Don't Know
 Organ Donor: Yes
 SS#: 123-45-6789

Emergency Contacts
 Adam Carebinder H: 201-837-3210
 Deborah Albright H: (973) 283-7461
 C: (676) 334-6789
 W: 674-856-1233
 Marlene Stolnick H: (298) 403-9486
 C: (212) 689-2738
 W:



Emergency Medical Wallet Card

Vital medical Information

Doctor	Phone
Dr. Jonathan Heartfelt	212-456-7897
Dr. Lloyd Werstein MD	(234) 487-3355
Dr. Neeta Mammo MD	234-686-4440
Dr. Wendy Welcome	(273) 894-9599

Health Insurance Carriers
 United Healthcare - Grp#: 83293856


Medications
 Acetaminophine
 Geritol
 Diazepam
 Omeprazole

Allergies
 Aspirin
 Bee Stings
 Florenol
 Penicillin
 Sulfas
 Sulfa


Primary Medical Conditions
 Hiatal Hernia

Financial Reports

Residence: 1605 Washtenaw Avenue Ann Arbor, MI

AssetInVID:		Purchased From:	CBL Fine Arts	Don't Share:	<input type="checkbox"/>	Picture:	
Item Type:	Picture	Ownership:	Colleen Carebinder				
Item Name:	Finally A Subway Series	Quantity:	1				
Item Description:		Serial Number:	0932840				
Brand Name:	Fazzino	Model Number:	SS-92385				
Item Location:	Living Room	VIN:		Warr Exp Date:	4/1/2011		
Purchase Date:	5/1/2001	Warranty Company:	Fazzino Warranty	Insured:	Yes		
Value of Item:	4000	Warranty Co Phone:	(800) 419-6739	Item Condition:	Mint		
Cost of Item:	3000	Warranty Type:	Full Coverage	Policy/Contract #:	3095809		

Notes: Yankees vs. Mets

AssetInVID:		Purchased From:	Estate	Don't Share:	<input type="checkbox"/>	Picture:	
Item Type:	Picture	Ownership:	Residence				
Item Name:	Shot Heard Round the World	Quantity:	1				
Item Description:	Framed, signed poster	Serial Number:	234235				
Brand Name:	Cooperstown	Model Number:					
Item Location:	Third Floor	VIN:	249	Warr Exp Date:	3/9/2015		
Purchase Date:	4/1/2006	Warranty Company:	CBL Fine Arts	Insured:	Yes		
Value of Item:	250	Warranty Co Phone:	(800) 529-7319	Item Condition:	Good		
Cost of Item:	175	Warranty Type:	Limited Coverage	Policy/Contract #:	0987897		

Notes: Framed Poster - 40th Anniversary

Tuesday, January 04, 2011

Adam Paul Carebinder
 88 Washington Avenue
 Mariette, IN 37485

Dear Adam,

From time to time, I will be sending you an updated 'data locator' that contains key information as to the location of our assets and critical contacts, in the event that anything should happen to me during the year. I love you very much and would want to make a very difficult time as easy as possible for you.

Love, as always,

Mom

Emergency Contacts (ICE)

<u>Name of Contact</u>	<u>Relationship</u>	<u>Primary Phone</u>	<u>Cell Phone</u>	<u>HC Proxy?</u>
Marlene J. Stolnick	Trustee	(248) 437-4076	(212) 689-2738	<input type="checkbox"/>
Deborah Gayle Albright	Best Friend	(248) 437-4076		<input type="checkbox"/>
Adam Paul Carebinder	Child	(248) 437-4076	(676) 334-6789	<input checked="" type="checkbox"/>

Professional Firms

Marlena Lorin	Bank	Bank of NY	(919) 222-2611
Drew Stonewall	Insurance	Green & Green Insurance Co.	(248) 612-2010
Donald S. Night	Estate Attorney	Hickock & Oakley	249-394-3998
Ian M. Moneymaker	Investment Firm	Morgan Stanley Investments	(212) 345-6789

Financial Accounts

<u>Account Firm Name</u>	<u>Account Manager</u>	<u>Acct Mgr Phone</u>	<u>Account Type</u>	<u>Account Number</u>
Bank of America	Barbara Jean Eisner	(248) 612-2010	Checking	1928445
Green & Green Insurance Co.	Drew Stonewall	(248) 612-2010	Brokerage Account	1029475
Morgan Stanley Investments			Credit Line	12345

Critical Documents

<u>Document Type</u>	<u>Document Location</u>	<u>ICOD Release To</u>
Birth Certificate	Home Safe	Adam Paul Carebinder
Deed	Home Safe	Adam Paul Carebinder
Will	Attorney's Office	Adam Paul Carebinder

Credit/Misc. Cards

Issued By:				<u>Phone # for</u>
Card Name	<u>Card Type</u>	<u>Card No</u>	<u>Expiration Date</u>	<u>lost card</u>
American Express	Credit	341092834001923	3/31/2012	800-222-9384
Issued By:	<u>Bank of America</u>			<u>Phone # for</u>
Card Name	<u>Card Type</u>	<u>Card No</u>	<u>Expiration Date</u>	<u>lost card</u>
Visa	Credit	203957493028	4/15/2010	800-987-6555

Investments

 Investment Firm: **Morgan Stanley Investments**

<u>Investment Name</u>	<u>Investment Type</u>	<u>Investment Mgr</u>	<u>Purchase Date</u>
Vanguard	Retirement Fund	Ian Moneymaker - (908) 777-6666 x 233	

Policies and Contracts

<u>Contract Name</u>	<u>Contract Type</u>	<u>Contract Number</u>	<u>Firm/Contact/Phone</u>
ACE	House Insurance	23445679H	Bank of America - R. Richard - (248) 612-2010
AIG	Fine Arts Policy	AIG203957	Bank of America - R. Richard - (248) 612-2010
Genworth	Life Insurance	203958	Hickock & Oakley - Donald Night - 249-394-3998

Member Passwords/Secure Locations

<u>Secured Location</u>	<u>Type of Security</u>	<u>Website</u>	<u>Username</u>	<u>Password</u>	<u>Security 2 Answer</u>
1605 Alarm Code	Code	www.amex.com	CCareBinder	amex4321	mother
CC Laptop	Password		Aquarius	X35Schvl	
Home Safe	Combination			12-24-88	

Assets/Inventory

 Address: **Secondary/Vacation Residence 1605 Washtenaw Avenue Ann Arbor MI 48104**

<u>Item Name</u>	<u>Item Description</u>	<u>Item Type</u>	<u>Item Location</u>	<u>Notes</u>
Finally A Subway Series	Picture		Living Room	Yankees vs. Mets
Sapphire Ring		Jewelry		



Data Locator with Valuations

Member: Colleen R. Carebinder

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Tuesday, January 04, 2011

Marlene J. Stolnick
345 Monroe Street Up the Hill
Boonestown, NY 11234

Dear Marlene,

Attached is an updated "data locator" that contains key information as to the location of our assets and critical contacts, in the event that anything should happen to me during the year.

If you have any questions about the enclosed, please call me or contact one of my trusted advisors below.

Sincerely,

Colleen W. Carebinder

Emergency Contacts (ICE)

<u>Name of Contact</u>	<u>Relationship</u>	<u>Primary Phone</u>	<u>Cell Phone</u>	<u>HC Proxy</u>
Marlene J. Stolnick	Trustee	(248) 437-4076	(212) 689-2738	<input type="checkbox"/>
Deborah Gayle Albright	Best Friend	(248) 437-4076		<input type="checkbox"/>
Adam Paul Carebinder	Child	(248) 437-4076	(676) 334-6789	<input checked="" type="checkbox"/>

Professional Firms

<u>Professional</u>	<u>Professional Type</u>	<u>Firm Name</u>	<u>Professional Phone</u>
Barbara Jean Eisner	Bank	Bank of America	(248) 612-2010
R. John Richard	Bank	Bank of America	(248) 612-2010
Marlena Lorin	Bank	Bank of NY	(487) 455-9785
Marlena Lorin	Bank	Bank of NY	(919) 222-2611
Drew Stonewall	Insurance	Green & Green Insurance Co.	(248) 612-2010
Donald S. Night	Estate Attorney	Hidcock & Oakley	249-394-3998
Ian M. Moneymaker	Investment Firm	Morgan Stanley Investments	(212) 345-6789

Financial Accounts

Account Firm Name: **Bank of America**

<u>Account Manager</u>	<u>Acct Mgr Phone</u>	<u>Account Type</u>	<u>Account Number</u>	<u>Date of Value</u>	<u>Value</u>
Barbara Jean Eisner	(248) 612-2010	Checking	1928445	6/30/2010	\$3,600
Total:					\$3,600

Financial Accounts

 Account Firm Name: **Bank of NY**

Account Manager	Acct Mgr Phone	Account Type	Account Number	Date of Value	Value
Marlena Lorin	(487) 455-9785	IRA Account	5671235		\$135,687

Total:	\$135,687
---------------	------------------

Financial Accounts Total: \$139,287
Credit/Misc. Cards

Issued By:

Card Name	Card Type	Card No	Expiration Date	Phone #For lost card
American Express	Credit	341092834001923	3/31/2012 - 800-222-9394	

 Issued By: **Bank of America**

Card Name	Card Type	Card No	Expiration Date	Phone #For lost card
Visa	Credit	203957493028	4/15/2010 - 800-987-6555	

Investments

 Investment Firm: **Morgan Stanley Investments**

Investment Name	Investment Type	Investment Mgr	Date of Value	Value
Vanguard	Retirement Fund	Ian Moneymaker - (908) 777-6666 x 233	6/7/2008	\$101,200

Total:	\$101,200
---------------	------------------

Investments Total: \$101,200
Policies and Contracts

Contract Name	Contract Type	Contract Number	Firm/Contact/Phone	Policy Value
ACE	House Insurance	23445679H	Bank of America - R. Richard - (248) 612-2010	
AIG	Fine Arts Policy	AIG203957	Bank of America - R. Richard - (248) 612-2010	\$400,000
Genworth	Life Insurance	203958	Hickock & Oakley - Donald Night - 249-394-3998	\$1,000,000

Policies and Contracts Total: \$1,400,000
Critical Documents

Document Type	Document Location	ICOD Release To
Birth Certificate	Home Safe	Adam Paul Carebinder
Marriage License	Home Safe	Adam Paul Carebinder
Will	Attorney's Office	Adam Paul Carebinder

Critical Documents

<u>Document Type</u>	<u>Document Location</u>	<u>ICOD Release To</u>
Birth Certificate	Home Safe	Adam Paul Carebinder
Marriage License	Home Safe	Adam Paul Carebinder
Will	Attorney's Office	Adam Paul Carebinder

Member Passwords/Secure Locations

<u>Secured Location</u>	<u>Type of Security</u>	<u>Website</u>	<u>Username</u>	<u>Password</u>	<u>Security 2 Answer</u>
1605 Alarm Code	Code	www.amex.com	Carebinder	amex4321	mother
1605 Garage Code	Code			6577	
CC Laptop	Password		Aquarius	X355skvl	
Home Safe	Combination			12-2448	

Assets/Inventory

Address: Secondary/Vacation Residence 1605 Washtenaw Avenue Ann Arbor MI 48104

<u>Item Name</u>	<u>Item Description</u>	<u>Item Type</u>	<u>Item Location</u>	<u>Value of Item</u>
Finally A Subway Series		Picture	Living Room	\$4,000
Sapphire Ring		Jewelry		

Total: \$4,000Grand Total: \$1,644,487

Credit/Misc Cards

Issued By	Card Name	Card Type	Card Number	Expiration Date	Secure ID Number	Lost Card Phone Number
	American Express	Credit	341092834001923	3/31/2012	3456	800-222-9384
	Continental OnePass	Travel	TU234958			
Bank of America	Visa	Credit	203957493028	4/15/2010	123	800-987-6555

Medical Insurance Cards

Policy Name	Issued By (Carrier)	Policy Type	Group Number	Policy Number	Insured Name	Lost Card Phone Number
Oxford	United Healthcare	Health	83293856	203957	Adam Carebinder	(800) 767-3840
AARP	AARP	Supplemental Health	83293856	4930576	Colleen Carebinder	(888) 867-5575

Government Issued Cards

Issued By	Card Type	Card Number	Expiration Date	Issued At
	Blood Donor Card			
Department of Motor Vehicles	Driver's License	K08776655432	8/13/2012	MICHIGAN
WACS	Military ID	W123456		Ann Arbor, Hampton Roads
State Department	Passport Card			
Social Security Administration	Social Security	123-45-6789	Never	

Education ID Cards

Issued By

University of Michigan

Asset Related








Residence: Primary Residence, 1605 Washtenaw Avenue, Ann Arbor, MI







Item Type	Item Name	Item Description	Identification Number
Car	Jaguar	2005 x wagon	6342953928374NJ33

Residential Access Cards

Address Name	Address1	Address2	City	State	Zip Code
Primary Residence	1605 Washtenaw Avenue		Ann Arbor	MICHIGAN	48104

Tracker Reports

Identifier	Category	Event Name	Start Date	Date Completed	Value	Notes	Hidden	Attachment
	DVD Collection	Little Miss Sunshine	1/1/2006			8 cute, but not terrific	<input type="checkbox"/>	
	DVD Collection	The Godfather	1/1/1972			9.1 R-Rated, V	<input type="checkbox"/>	
	DVD Collection	The Muppet Movie	1/1/1986			9 go Miss Piggie!	<input type="checkbox"/>	
	DVD Collection	Star Wars Episode V: The Empire	1/1/1980			8.8 not for trekkies	<input type="checkbox"/>	
	DVD Collection	Casablanca	1/1/1942			8.8 all time classic	<input type="checkbox"/>	
	DVD Collection	Forrest Gump	1/1/1994			8.5 life is like a box of chocolates..	<input type="checkbox"/>	
family - Deborah AI	DVD Collection	WALL-E	1/1/2009			8.5 great for kids	<input type="checkbox"/>	

Identifier	Category	Event Name	Start Date	Date Completed	Value	Notes	Hidden	Attachment
	Donations	ASPCA	11/20/2010		\$300.00		<input type="checkbox"/>	
	Donations	Hackensack Medical Center	10/15/2009		\$500.00		<input type="checkbox"/>	
	Donations	URJ	10/15/2009		\$1,500.00		<input type="checkbox"/>	
	Donations	American Diabetes Association	8/14/2009		\$3,000.00		<input type="checkbox"/>	
	Donations	American Heart Association	8/14/2009		\$4,000.00		<input type="checkbox"/>	
	Donations	Friendship House	8/14/2009		\$300.00		<input type="checkbox"/>	
Total:					\$9,600.00			

Reason For Claim: Heart Attack
Patient: Marlene Stolnick

Service Performed	Insurance Company	Claim/ Ref#	First submitted claim to	Amt Billed	I Paid To Provider	Flex Paid Provider	Insurance Paid Provider	Insurance Due Provider	Insurance Paid To Me	Insurance Due To Me	Remainder Due Provider	Remainder Due Me	Total Amt Paid	
CT Scan	Medicare	322-1027		\$1,350.00	\$0.00	\$0.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$350.00	\$0.00	\$1,000.00	
CT Scan	AARP	468-1005322	Medicare	\$350.00	\$0.00	\$0.00	\$250.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$250.00	
CT Scan	FLEX	Flex	AARP	\$100.00	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	
Total \$ for CT Scan:				\$1,350.00	\$0.00	\$100.00	\$1,250.00	N/A	\$0.00	\$0.00	\$0.00	\$0.00	\$1,350.00	
Dr. Denton visit	Medicare	322-1025		\$1,650.00	\$0.00	\$0.00	\$750.00	\$0.00	\$0.00	\$0.00	\$900.00	\$0.00	\$750.00	
Dr. Denton visit	AARP	468-1004335	Medicare	\$900.00	\$0.00	\$0.00	\$750.00	\$0.00	\$0.00	\$0.00	\$150.00	\$0.00	\$750.00	
Dr. Denton visit	Flex	FLEX	AARP	\$150.00	\$0.00	\$150.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00	
Total \$ for Dr. Denton visit:				\$1,650.00	\$0.00	\$150.00	\$1,500.00	N/A	\$0.00	\$0.00	\$0.00	\$0.00	\$1,650.00	
Emergency Room	Medicare	388-784		\$2,650.00	\$0.00	\$0.00	\$2,000.00	\$0.00	\$0.00	\$0.00	\$650.00	\$0.00	\$2,000.00	
Emergency Room	AARP	468-1004327	Medicare	\$650.00	\$400.00	\$0.00	\$0.00	\$100.00	\$400.00	\$0.00	\$250.00	\$0.00	\$400.00	
Emergency Room	Flex	FLEX	AARP	\$250.00	\$100.00	\$150.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$250.00	
Total \$ for Emergency Rooms:				\$2,650.00	\$500.00	\$150.00	\$2,000.00	N/A	\$400.00	\$0.00	\$0.00	\$0.00	\$2,650.00	
Hospital Stay	Medicare	322-1023		\$11,650.00	\$0.00	\$0.00	\$4,000.00	\$1,000.00	\$0.00	\$0.00	\$7,650.00	\$0.00	\$4,000.00	
Hospital Stay	AARP	468-1004335	Medicare	\$6,650.00	\$650.00	\$0.00	\$6,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,650.00	
Total \$ for Hospital Stay:				\$11,650.00	\$650.00	\$0.00	\$10,000.00	N/A	\$0.00	\$0.00	\$1,000.00	\$0.00	\$10,650.00	
MRI	Medicare	322-1026		\$1,650.00	\$0.00	\$0.00	\$750.00	\$0.00	\$0.00	\$0.00	\$900.00	\$0.00	\$750.00	
MRI	AARP	468-1005243	Medicare	\$900.00	\$0.00	\$0.00	\$750.00	\$0.00	\$0.00	\$0.00	\$150.00	\$0.00	\$750.00	
Total \$ for MRI:				\$1,650.00	\$0.00	\$0.00	\$1,500.00	N/A	\$0.00	\$0.00	\$150.00	\$0.00	\$1,500.00	
Taken to Hospital	Medicare	322-999		\$650.00	\$650.00	\$0.00	\$0.00	\$0.00	\$500.00	\$0.00	\$0.00	\$0.00	\$650.00	
Total \$ for Taken to Hospital:				\$650.00	\$650.00	\$0.00	\$0.00	N/A	\$500.00	\$0.00	\$0.00	\$0.00	\$650.00	
Total \$ for Patient:				\$19,600.00	\$1,800.00	\$400.00	\$16,250.00	N/A	\$900.00	N/A	N/A	N/A	N/A	\$18,450.00

Reason For Claim: Heart Attack

Total \$ for Reason for Claim:	\$19,600.00	\$1,800.00	\$400.00	\$16,250.00	N/A	\$900.00	N/A	N/A	N/A	N/A	N/A	\$18,450.00
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Reason for Claim	Claim Date	Asset	Notes	Hidden
Flood from Boiler Valve	1/13/2010	house		<input type="checkbox"/>

Insurance

Insurance Policy Name	Policy#	Claim#	Type Of Coverage	Policy Max. Allowed	Deductible	Deductible Met
ACE	23445679H	59801575	House Insurance		\$1,000.00	<input type="checkbox"/>

Repair/Service

Service Provider	Type of Service	Invoice #	Invoice Date	Invoice Amt.	Amount Paid	Balance Due	Amt. Due Me	
Spider	finish painting wall		8/10/2010	\$100.00	\$0.00	\$100.00	\$0.00	
Spider	patch kitchen ceiling		2/22/2010	\$370.00	\$470.00	(\$100.00)	\$0.00	
ServPro	install dehumidifiers		1/13/2010	\$4,000.00	\$4,000.00	\$0.00	\$0.00	
Pattman Plumbing	Respond to flood call	6454	1/14/2010	\$609.00	\$609.30	(\$0.30)	\$0.00	
Total Repair costs for Flood from Boiler Valve				Total:	\$5,079.00	\$5,079.30	(\$0.30)	\$0.00
Grand Total Repairs				Total:	\$5,079.00	\$5,079.30	(\$0.30)	\$0.00

<u>Section</u>	<u>SubTab</u>	<u>Last Updated</u>
Personal	Member Details	1/3/2011
	Residence	12/23/2010
	Personal Contacts	12/27/2010
	Pets	1/3/2011
	Professional Firms	1/3/2011
	Residential Service Providers	1/2/2011
	Education	1/3/2011
	Employment	12/28/2010
	Military Service	10/27/2010
	Groups and Affiliations	1/2/2011
	Last Wishes	1/2/2011
	Passwords	1/2/2011

<u>Section</u>	<u>SubTab</u>	<u>Last Updated</u>
Medical	Medical Facilities and Services	10/17/2010
	Doctors	1/3/2011
	Dr. Visit/Diagnoses	1/3/2011
	Medical Insurance	1/3/2011
	HealthCare History	1/3/2011
	Rx Appliances	8/20/2009
	Medical Procedures	4/22/2010
	Medications	1/3/2011

<u>Section</u>	<u>SubTab</u>	<u>Last Updated</u>
Financial	Assets and Inventory	1/3/2011
	Property Details	6/11/2009
	Financial Accounts	12/28/2010
	Credit/Misc. Cards	7/14/2010
	Subscriptions	10/27/2010
	Policies and Contracts	12/28/2010
	Critical Documents	12/28/2010
	Investments	1/3/2011

<u>Section</u>	<u>SubTab</u>	<u>Last Updated</u>
Tracker	Personal Tracker	1/3/2011
	Vital Statistics	1/1/2011
	Financial Tracker	1/3/2011
	Medical Claims Tracker	1/1/2011
	Misc. Claims Tracker	1/1/2011

<u>Section</u>	<u>SubTab</u>	<u>Last Updated</u>
Reminders	Reminders	10/10/2010



Thank you.