

## Section III: Recurring Income Not Associated with Accounts or Assets

**3. Recurring Income Not Associated with Accounts or Assets***Income 1*

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Relationship to Veteran: Child  
Name: Jane Doe  
Income Type: Wages  
Gross Monthly Income: \$99,999.99  
Payer: Generic Company, LLC

*Income 2*

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Relationship to Veteran: Other  
Relationship Type: Cousin  
Name: Sam Jenkins  
Income Type: Other  
Other Income Type: Stocks  
Gross Monthly Income: \$99.00  
Payer: Investment Company

*Income 3*

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Relationship to Veteran: Veteran  
Income Type: Social Security  
Gross Monthly Income: \$102.33  
Payer: Social Security Administration

*Income 4*

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Relationship to Veteran: Spouse  
Income Type: Retirement Pension  
Gross Monthly Income: \$1,099.99  
Payer: Pension Benefit Management

*Income 5*

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Relationship to Veteran: Parent  
Name: Edmund Doe  
Income Type: Civil Service  
Gross Monthly Income: \$12,345.67  
Payer: Personnel Management

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*Income 6*

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Relationship to Veteran: Custodian  
Name: Sam Doe  
Income Type: Unemployment  
Gross Monthly Income: \$1,000.00  
Payer: Agency of Unemployment

## Section IV: Associated Incomes

**4. Associated Incomes***Income 1*

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Relationship to Veteran: Custodian  
Name: Jim Brown  
Payer: Jack Smith  
Income Type: Interest  
Gross Monthly Income: \$12,345.00  
Account Value: \$12,987.00

*Income 2*

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Relationship to Veteran: Other  
Relationship Type: Friend  
Name: Brandon Jones  
Payer: Harold Washington  
Income Type: Dividends  
Gross Monthly Income: \$23,987.00  
Account Value: \$9,900.00

*Income 3*

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Relationship to Veteran: Spouse  
Payer: US Government  
Income Type: Other  
Other Income Type: Bonds  
Gross Monthly Income: \$123.00  
Account Value: \$100.00

*Income 4*

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Relationship to Veteran: Parent  
Name: Willow Washington  
Payer: Municipality Bank  
Income Type: Dividends  
Gross Monthly Income: \$987,654.00  
Account Value: \$111.00

*Income 5*

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Relationship to Veteran: Child  
Name: Rand Lincoln  
Payer: Bank  
Income Type: Interest  
Gross Monthly Income: \$222.00  
Account Value: \$222.00

## Section V: Income and Net Worth Associated with Owned Assets

**5. Income and Net Worth Associated with Owned Assets***Asset 1*

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Relationship to Veteran: Custodian  
Name: Jim Brown  
Asset Type: Farm  
Gross Monthly Income: \$5,555.55  
Owned Portion Value: \$5,555,555.55

*Asset 2*

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Relationship to Veteran: Other  
Relationship Type: Friend  
Name: Brandon Jones  
Asset Type: Business  
Gross Monthly Income: \$999.99  
Owned Portion Value: \$10,000.00

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*Asset 3*

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Relationship to Veteran: Parent  
Name: Edmund Doe  
Asset Type: Rental Property  
Gross Monthly Income: \$123.45  
Owned Portion Value: \$12,345.67

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*Asset 4*

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Relationship to Veteran: Custodian  
Name: Jim Brown  
Asset Type: Farm  
Gross Monthly Income: \$1,000.00  
Owned Portion Value: \$12,345.67

## Section VI: Income and Net Worth Associated with Royalties and Other Properties

### 6. Income and Net Worth Associated with Royalties and Other Properties

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*Royalty/Property 1*

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Relationship to Veteran: Spouse  
Income Type: Rental  
Income Generation Method: Other  
Gross Monthly Income: \$12,345.67  
Fair Market Value: \$12,345,678.91  
Can Be Sold: No  
Mitigating Circumstances: Contractual obligations

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*Royalty/Property 2*

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Relationship to Veteran: Spouse  
Income Generation Method: Intellectual Property  
Gross Monthly Income: \$100.00  
Fair Market Value: \$1,000.00  
Can Be Sold: Yes

*Royalty/Property 3*

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Relationship to Veteran: Other  
Relationship Type: Sibling  
Name: John Smith  
Income Generation Method: Use Of Land  
Gross Monthly Income: \$123.00  
Fair Market Value: \$1,234.00  
Can Be Sold: Yes

*Royalty/Property 4*

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Relationship to Veteran: Parent  
Name: John Doe  
Income Generation Method: Minerals / Lumber  
Gross Monthly Income: \$100.00  
Fair Market Value: \$300.00  
Can Be Sold: Yes

## Section VII: Asset Transfers

**7. Asset Transfers***Asset Transfer 1*

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Relationship to Veteran: Other  
Relationship Type: Second cousin twice removed of my mother in law  
Sale Price: \$823,456,700.89  
Capital Gain: \$723,456,700.89  
Transfer Method: Other  
Other Transfer Method: Earned income from doing work on my siblings house to clean in  
Asset Type: Clothes from my grandmothers attic which have been passed down through the family and are priceless - value estimated  
New Owner Name: JohnsonbergerheimerJohnathan JacobJingleheimerSchmidt Jr.  
Relationship to New Owner: Sibling  
Sale Reported to IRS: Yes  
Transferred Under Fair Market Value: No  
Fair Market Value: \$100,000,000.00

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*Asset Transfer 2*

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Relationship to Veteran: Other  
Relationship Type: Cousin  
Sale Price: \$8,234,567.89  
Capital Gain: \$7,234,567.89  
Transfer Method: Other  
Other Transfer Method: Earned  
Asset Type: Clothes  
New Owner Name: John Doe Jr.  
Relationship to New Owner: Sibling  
Sale Reported to IRS: Yes  
Transferred Under Fair Market Value: No  
Fair Market Value: \$1,000,000.00

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*Asset Transfer 3*

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Relationship to Veteran: Child  
Sale Price: \$100.00  
Capital Gain: \$0.00  
Transfer Method: Gifted  
Asset Type: Artwork  
New Owner Name: Jacob Doe Sr.  
Relationship to New Owner: Aunt  
Sale Reported to IRS: No  
Transferred Under Fair Market Value: Yes  
Fair Market Value: \$123.12

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*Asset Transfer 4*

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Relationship to Veteran: Parent  
Sale Price: \$2,000.00  
Capital Gain: \$200.99  
Transfer Method: Traded  
Asset Type: Bike  
New Owner Name: John Doe Jr.  
Relationship to New Owner: Brother  
Sale Reported to IRS: Yes  
Transferred Under Fair Market Value: No  
Fair Market Value: \$1,800.99

## Section VIII: Trusts

**8. Trusts***Trust 1*

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Date Established:	1982-02-02
Market Value:	\$500,000.00
Trust Type:	Irrevocable
Added Funds:	No
Receiving Income from Trust:	No
Annual Income:	\$0.00
Used for Medical Expenses:	No
Monthly Medical Reimbursement:	\$0.00
Trust Established for Veteran's Child:	No
Additional Authority or Control of Trust:	No

*Trust 2*

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Date Established:	1982-02-02
Market Value:	\$9,000,000.00
Trust Type:	Burial
Added Funds:	Yes
Date Added:	1985-02-01
Amount Added:	\$200.12
Receiving Income from Trust:	Yes
Annual Income:	\$80,000.00
Used for Medical Expenses:	Yes
Monthly Medical Reimbursement:	\$123,456.78
Trust Established for Veteran's Child:	Yes
Additional Authority or Control of Trust:	Yes

## Section IX: Annuities

**9. Annuities***Annuity 1*

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Date Established:	2020-01-01
Market Value:	\$1,234,568.89
Added Funds:	Yes
Date Added:	2022-02-02
Amount Added:	\$2,222,222.22
Revocable:	Yes
Receiving Income from Annuity:	Yes
Annual Received Income:	\$1,222,333.44
Can Be Liquidated:	Yes
Surrender Value:	\$5,666,777.88

*Annuity 2*

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Date Established:	1920-01-01
Market Value:	\$123.45
Added Funds:	No
Revocable:	No
Receiving Income from Annuity:	No
Annual Received Income:	\$0.00
Can Be Liquidated:	No
Surrender Value:	\$0.00

## Section X: Assets Previously Not Reported

**10. Assets Previously Not Reported***Unreported Asset 1*

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Relationship to Veteran:	Veteran
Asset Type:	Cash
Owned Portion Value:	\$11,222,333.44
Asset Location:	Financial institution



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*Unreported Asset 2*

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Relationship to Veteran: Spouse  
Asset Type: Art  
Owned Portion Value: \$123.45  
Asset Location: 123 Main St

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*Unreported Asset 3*

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Relationship to Veteran: Child  
Asset Type: Coins  
Owned Portion Value: \$10.00  
Asset Location: 123 Main St

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*Unreported Asset 4*

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Relationship to Veteran: Parent  
Asset Type: Chandelier  
Owned Portion Value: \$2,000.00  
Asset Location: 123 Main St

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*Unreported Asset 5*

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Relationship to Veteran: Other  
Relationship Type: Sibling  
Asset Type: Eggs  
Owned Portion Value: \$2,345.67  
Asset Location: Henhouse

## Section XI: Discontinued or Irregular Income

### 11. Discontinued or Irregular Income

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*Discontinued Income 1*

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Relationship to Veteran: Other  
Relationship Type: Sibling  
Recipient Name: John Smith  
Income Payer: Banking America  
Income Type: Dividends  
Income Frequency: One Time  
Date Income Last Paid: 01/01/2022  
Gross Annual Amount: \$123,456.78

*Discontinued Income 2*

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Relationship to Veteran: Custodian  
Recipient Name: Brandon Johnson  
Income Payer: George Smith  
Income Type: Interest  
Income Frequency: Irregular  
Date Income Last Paid: 05/01/2000  
Gross Annual Amount: \$200,000.00

*Discontinued Income 3*

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Relationship to Veteran: Veteran  
Income Payer: Banking America  
Income Type: Payments  
Income Frequency: Recurring  
Date Income Last Paid: 05/01/1920  
Gross Annual Amount: \$123.45

## Section XII: Waiver of Receipt of Income

**12. Waiver of Receipt of Income***Income Receipt Waiver 1*

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Relationship to Veteran: Custodian  
Recipient Name: George Bankman  
Income Payer: Bank of America  
Expected Income: \$123,567.90  
Date Payments Will Resume: 04/01/2026  
Payment Will Resume: Yes  
Waived Gross Monthly Income: \$123,456.78

*Income Receipt Waiver 2*

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Relationship to Veteran: Parent  
Recipient Name: John Smith  
Income Payer: Bank of America  
Expected Income: \$0.00  
Payment Will Resume: No  
Waived Gross Monthly Income: \$100.00

*Income Receipt Waiver 3*

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Relationship to Veteran:	Veteran
Income Payer:	Banking Place
Expected Income:	\$0.00
Payment Will Resume:	No
Waived Gross Monthly Income:	\$222.22