

LIST OF DOCUMENTS NEEDED TO PREPARE FOR MEDICAID APPLICATION

1. Social Security Card(s) for client (and spouse, if married).
2. Birth Certificate(s) or other proof of citizenship and birthdate for client (and spouse, if married).
3. Current Will(s), Power(s) of Attorney and Living Will(s) for client (and spouse, if married) if not previously supplied to us.
4. Medicare and insurance cards, and copies of latest premium payment(s) for insurance for client (and spouse, if married).
5. Long-term insurance policy/policies for client (and spouse, if married).
6. Medigap (supplemental health insurance policy) card and premium statement for client (and spouse, if married).
7. Deeds for all real estate, most recent tax bills, insurance premium statements for homeowner insurance (if not previously provided to us).
8. Copies of last 36 monthly statements for all bank accounts, brokerage accounts, stock accounts, etc. Retain 60 months of statements for all accounts.
9. Copies of stock certificates, bonds, savings bonds, mortgages or promissory notes of other assets owned by client (or spouse, if married).
10. Copies of Prenuptial/Postnuptial Agreement (if any).
11. Written documentation stating gross current amount of all income (i.e., Social Security, pension.)
If no documentation exists, call the company to request that written documentation be sent to the home address.
12. If you own property that you lease, copies of any lease(s) for your property.
13. Documentation of your current mortgage amount (or rental amount).
14. Documentation (bank statements or cancelled checks) of any gifts you made during the last 5 years. Must have exact date of gift and amount.
15. Federal Income Tax Return for last year.
16. For any life insurance policies you have (on your or your spouse), copy of the policy and a copy of a recent statement showing: Face Value, Cash Value, Death Benefit, and current beneficiaries, if available.
17. For any annuity you (or your spouse) own, a copy of the annuity contract and a copy of a recent statement.
18. Documentation showing closing of any accounts (i.e. CDs, insurance policies, stock certificates, annuities) within the past 5 years.