



# ANDERSON ELDER LAW

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## 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 supplemental health insurance cards (front and back), prescription card, 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. Deeds for all real estate, most recent tax bills, insurance premium statements for homeowner insurance (if not previously provided to us).
7. Copies of statements for the past 5 year period for all bank accounts, brokerage accounts, stock accounts, etc.
8. Copies of stock certificates, bonds, savings bonds, mortgages or promissory notes of other assets owned by client (or spouse, if married).
9. Copies of titles or registrations for all automobiles owned.
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), and most recent utility bills.
14. Documentation (bank statements or cancelled checks) of **any** gifts you made during the past 5 year period. 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 you 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) during the past five year period.
19. Documentation of any pre-arranged funeral expenses, cemetery plots, etc.