

Pyle & Dellinger, PL

In order to assist us with your Medicaid Planning, you will need to provide our office with the following documents. Please bring the originals and we will make photocopies for our file:

1. Copy of current Will, Trust and/or Power of Attorney. Copy of any guardianship papers if Applicant has a legally appointed guardian.
2. Letter from Social Security stating gross monthly social security benefits and the date the benefits began for Applicant. This letter is sent by the Social Security Administration in December of each year. You can also obtain this information by calling the local Social Security Administration Office and requesting the same be mailed to Applicant's home.
3. Proof of all income, including Pension, Veterans Benefits (VA), dividends/interest, and annuity income. If Applicant receives a pension, please call the Company to request written documentation as to the GROSS amount of the pension.
4. Information on any annuities owned by Applicant, including the date and amount of purchase and the outstanding balance.
5. All Life Insurance policies for Applicant. A letter should be obtained from the Insurance Company as to the Cash Value, if any, of each policy.
6. Pre-paid burial, funeral and/or cremation contract and any burial account, if one has been established, for Applicant. Copy of Deed to Cemetery plot.
7. Stock certificates, Savings Bonds, and Certificates of Deposit for Applicant along with the current market value of all stocks, bonds and CDs.
8. Last three statements on all IRA, 401 K, KEOGH or other retirement accounts for Applicant.
9. Last three bank statement on all checking, savings, credit union and security/brokerage accounts for Applicant.
10. Deed and real property tax bill for Applicant's homestead property. Deed and real property tax bill for any other property owned by Applicant. We also need a copy of the Deed for any real property of which Applicant owns a life estate interest.

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11. Original mortgage papers, if not paid in full. Mortgage and/or Promissory Note currently held by Applicant.

12. Any other documentation evidencing ANY asset owned by Applicant, individually or jointly with another person or entity.

IMPORTANT: If Applicant has sold, transferred or gifted ANY assets with a value of \$3,000.00 or more within the last three years to any individual (or made any transfer of assets to a trust within the last five years), please bring documentation regarding the sale, transfer or gift of the asset.

If we will be filing an application for Medicaid benefits within the next month, we will also need copies of the following:

1. Drivers license or some other photo identification for Applicant.
2. Birth certificate or other proof of citizenship (if none, then voter's registration card) for Applicant.
3. Social Security card for Applicant.
4. Proof of Military Service if Applicant was a Veteran of the Armed Forces.
5. Medicare card and written proof of monthly payment for Applicant.
6. Supplemental Health Insurance Policy AND card for Applicant and written proof of monthly premium.
7. Long Term Care insurance policy for Applicant, if Applicant has one and written proof of monthly premium.
8. Vehicle Registration and proof of insurance on all vehicles owned by Applicant.

Although we will make copies of all these documents at our meeting, you will also want to bring all these items with you when we attend the Medicaid application meeting. The case worker may want to verify the documents we are providing are exact copies of the originals.