

DOCUMENTS TO BRING IN

If Applicant's name or Spouse's name appear anywhere on the title or document, please bring it in and we will determine whether it is relevant to the Medicaid application.

1. Copies of **LAST THREE BANK STATEMENTS**:
 - A. For all **CURRENT** accounts, checking, savings, certificate, etc.
 - B. For all accounts **CLOSED** during the last sixty (60) months.
2. Last check stub for Applicant and Spouse for pension from: Social Security, Veteran's Administration, Civil Service or Private Company.
3. Life Insurance Policies.
4. Auto Insurance Policies.
5. Long Term Care Policy.
6. Supplemental Health Insurance Policy Card and recent premium bill.
7. Annuity Policies.
8. Stock Certificates, Bonds, CD's, U.S. Govt. Treasury Bonds, Municipal Bonds, Individual Retirement Accounts (IRA's), etc.
9. **LAST THREE** stock broker statements:
 - A. For all **CURRENT** accounts.
 - B. For all accounts **CLOSED** during the last sixty (60) months.
10. Copy of any special burial bank account.
11. Copy of any prepaid burial or cremation contract.
12. Copy of Cemetery Plot Deed.
13. Copy of Deed to residence and last real estate tax bill.
14. Copy of Deed to any other real property on which the name of Applicant or Spouse appears.
15. Copy of any Mortgage and/or Promissory Note owing to Applicant or Spouse.
16. Copy of any title(s) issued by Department of Motor Vehicles.

17. Birth Certificate or other proof of citizenship (naturalization papers, religious records).
18. Copy of military discharge papers.
19. Social Security and Medicare Card (**ALL CARDS: Front and Back**)
20. Driver's Licenses of Applicant and Spouse.
21. Marriage License
22. Unpaid medical bills.
23. Current nursing home statement showing Date of Admission and Daily Rate.
24. Current Will, Trust, Power of Attorney, or other Estate Planning Document.

If you do not have access to a copy machine, you may drop off the originals at our office and we will make copies for you. We will call you after we have had the opportunity to make copies so that you may pick up the originals.

**IF ANY ASSETS HAVE BEEN TRANSFERRED OR GIFTED
WITHIN THE LAST SIXTY (60) MONTHS, IT IS NECESSARY
THAT YOU BRING IN DETAILED INFORMATION ABOUT ALL
SUCH TRANSFERS.**