

## Documents needed for Medicaid planning:

- Current statements for bank, brokerage, and CDs.
- Stock certificates, bonds, mutual funds, U.S. government bonds, municipals not held in brokerage account: certificates, current statements, dividend statement, investment plan or dividend reinvestment statements.
- Individual Retirement Accounts (IRAs) or other deferred compensation plans: current statement and beneficiary designations.
- Prepaid burial or cremation contract, deed to cemetery plot, current statement for special burial bank account.
- Title(s) issued by Department of Motor Vehicles for automobile, mobile home, boat, trailer, truck, van, recreational vehicle and proof of current insurance.
- Deed to residence, current real estate tax bill, proof of current homeowner's insurance, and mortgage information, if applicable.
- Copy of deed(s), tax bill, and proof of insurance for any other real property. If for sale, listing agreement and statement of fair market value from realtor.
- Life insurance and annuity policies, policy, current statement of value, and beneficiary information.
- Year end statements for brokerage accounts, annuities, life insurance policies, etc.
- Income verification (gross and net) from Social Security, Veterans Administration, Civil Service, pension, IRA distributions, and any other income.
- Mortgage and/or promissory note owing to you.
- Assets transferred (gifts) in the past 36 months for gifts: statements showing withdrawal and deposit to another account.
- Accounts closed in the last 36 months showing zero balance and copy of statement showing deposit of proceeds to another account.
- Income tax returns for the past 3 years including 1099s and other supporting documentation.
- Most recent nursing home bill.
- Personal documentation: Medicare cards, birth certificates.

- Military discharge papers.
- Supplemental health insurance card (both sides), and current premium statement.
- Medicare Part D prescription drug insurance card (both sides) and current premium statement.
- Long term care policy. Please include benefit page.
- Award letter from Social Security Disability or Supplemental Security Income.
- Last Will & Testament or any trust documents
- Powers of Attorney
- Health Care Surrogates
- Living Wills