LAW OFFICES OF ALBERT GOODWIN

Elder Law - Estate Planning - Medicaid Planning

LIST OF DOCUMENTS NEEDED TO APPLY FOR PUBLIC BENEFITS

Do NOT get overwhelmed; just do the best you can.

1. Social Security Card(s) for client (and spouse, if married; and dependent children, if any).
2. Birth Certificate(s) or other proof of citizenship and birth date for client (and spouse, if married; and dependent children, if any).
3. Current Will(s), Power(s) of Attorney and Living Will(s) for client (and spouse, if married).
4. For all of your health insurance coverage, copies of your insurance cards (front and back), prescription cards, and copies of latest premium payment(s) 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, and homeowners insurance premium statements.
7. Copies of statements for all bank accounts, brokerage accounts, stock accounts, etc.
   _______ last month _____one (1) year ______five (5) years
8. Copies of stock certificates, bonds, savings bonds, mortgages or promissory notes or 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.
12. If you lease property to someone, copies of any lease(s) for your property.
13. Documentation of your mortgage amount (or rental amount) and most recent utility bills.
14 Documentation of your current debts (credit card, auto loan, etc.).
15. Documentation (bank statements or cancelled checks) of **any** gifts you made in the past five (5) years. We must have exact date of gift and amount.
16. Federal Income Tax Return for last year.
17. 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.
18. For any annuity you (or your spouse) own, a copy of the annuity contract and a copy of a recent statement, and current beneficiaries.
19. Documentation showing closing of any accounts (i.e. CDs, insurance policies, stock certificates, annuities) for the past five (5) years.
20. Documentation of any pre-arranged funeral expenses, cemetery plots, burial accounts, etc.

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LIST OF DOCUMENTS FOR VA AID & ATTENDANCE IMPROVED PENSION

These items relate solely to applications for A&A.

1. Military Discharge or Separation Papers (DD214) for ALL Active Duty, Reserve Service, and National Guard Service.
2. Proof of Name Change, if name is different from that on military records.
3. If currently married, copy of marriage certificate.
4. If previously married, copy of marriage certificate from all previous marriages for the applicant (i.e., the veteran or the surviving spouse), including names, dates, and places of all previous marriages and/or end of marriages. Copies of all divorce papers from previous marriages, if applicable.
5. Copies of death certificate (for deceased veteran and surviving spouse, if filing for surviving spouse).
6. Copies of citizenship papers if not born in the US for the veteran and spouse.
7. Medical expense information; all **recurring** medical expenses for veteran and/or spouse.
    a) Print-out of pharmacy list and costs.
    b) Proof of medical insurance premium costs.
    c) Health Care Provider invoices for past year and current statement.
    d) Proof of payment for incontinence supplies or other recurring, non-medical expenses.
8. Voided check from Veteran's (or Surviving Spouse's) checking account.

REMINDERS & OTHER ITEMS REQUESTED

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