



MCGRATH LAW OFFICE P.C.

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TO: Clients inquiring about Public Aid Planning

FROM: McGrath Law Office, P.C.

The State of Illinois Medicaid requires a large amount of documentation to determine whether an applicant will be approved for long-term care nursing home benefits. If the Medicaid applicant is married, the documentation is required for both the Medicaid applicant and the Medicaid applicant's spouse. Gathering the documents needed to apply is a challenging process that is often determinative of the potential success of an application

The following is a list of documents that will be needed before an application for Medicaid benefits can be submitted to the state. As this is a time-consuming process, please begin gathering these documents at your earliest convenience. **YOU DO NOT NEED TO GATHER THESE DOCUMENTS PRIOR TO OUR INITIAL MEETING.** This is instead a list of documents the State will require in the event you apply for benefits.

- Driver's license, photo ID card, or passport.
- Social Security card, Medicare card, and Supplemental or Medicare HMO card.
- Statement or "TPQY" letter obtained from Social Security Administration to verify amount of applicant's social security income.
- Verification of pension income. This must be verified from the source. Check stubs are not sufficient. A letter must be furnished directly from the pension income provider verifying gross and net income, and any anticipated changes, or a statement of benefits from the provider may also be sufficient.
- Verification of gross monthly income from any other source. Furnish letters directly from the providers or statements directly from the provider.
- Copies of insurance policies and insurance cards. Life, accident, health (including supplemental or Medicare HMO). If there is a life insurance policy, provide information from company verifying cash surrender value, if any, and face value.
- Proof of citizenship. Needed only if the applicant was born outside the U.S.

PLEASE REPLY TO:

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- Copies of guardianship or power of attorney papers.
- Copy of Car title.
- Copy of deed for any property owned, including homestead.
- For any real property sold/transferred in the last five years: (a) Copies of all transactional papers. (b) Verification of fair market value, which may be an appraisal or a letter from a realtor. (c) Property tax bill reflecting property's value at time of sale.
- Copy of most recent property tax bill for all property, including homestead.
- Funeral arrangements. Copies of any purchase or agreements or any prepaid funeral contracts, cemetery or mausoleum plots, etc. All contracts must be irrevocable.
- Verification of active savings accounts, checking accounts, CD's, stocks, bank accounts, annuities, etc. Statements are needed for the past 60 months. Statements are needed for all accounts that have been opened or closed in the last 60 months. If assets are in a trust, statements are needed for the past five years.
- Copies of all checks written in excess of \$500 for the past 60 months.
- Automobile insurance policy.
- If applicant is a veteran: VA discharge papers, VA pension award letter (if any).
- Copy of qualified income trust, if applicable.
- Copy of personal services contract, if applicable.
- Last five years of income tax returns.