

## **MEDICAID CHECKLIST:**

### **\*ITEMS TO BRING FOR APPLICANT & SPOUSE\***

- DRIVERS LICENSE
- BIRTH CERTIFICATE
- MEDICARE CARD
- HEALTH INSURANCE CARD
- CURRENT BILL FOR HEALTH INSURANCE
- SOCIAL SECURITY CARD
- TRUST AGREEMENT
- DURABLE POWER OF ATTORNEY
- GUARDIANSHIP / CONSERVATORSHIP DOCUMENTS
- BANK ACCOUNT STATEMENTS
- CERTIFICATES OF DEPOSIT
- IRA / 401K STATEMENTS
- ANNUITY STATEMENT & COMPLETE CONTRACT
- STOCK CERTIFICATES
- BROKERAGE ACCOUNT STATEMENTS
- REAL ESTATE DOCUMENTS – DEEDS, MORTGAGE, PROPERTY TAX STATEMENTS
- HOMEOWNERS INSURANCE BILL
- PRIMARY RESIDENCE UTILITY BILLS – PHONE, GAS, ELECTRIC, PROPANE, ETC.
- LAND CONTRACTS
- VEHICLE TITLES
- VERIFICATION OF DEBTS OWED – CREDIT CARDS, LOANS, ETC.
- LIFE INSURANCE POLICIES & STATEMENT OF VALUES
- FUNERAL PLANS, BURIAL PLOTS, ETC.
- INCOME TAX RETURN – 3 YEARS
- VERIFICATION OF ALL INCOME – SOCIAL SECURITY, PENSION, OTHER