

Medicaid Application Verifications

Married Person

To help us prepare the Medicaid application for your loved one in as efficient manner as possible, please compile the following documents and bring them with you to our next meeting.

If you would prefer to bring copies rather than leave originals with our office, copies will be sufficient, except where noted below. Otherwise, we will make copies of the documents and return the originals to you.

- ❑ Birth certificate
- ❑ Marriage certificate
- ❑ Citizenship/naturalization papers, if applicable
- ❑ Medicare card
- ❑ Health insurance card (Blue Cross, for example)
- ❑ Copy of driver's license, if applicable
- ❑ Life insurance policies, on either spouse
- ❑ Burial plot information
- ❑ Irrevocable funeral agreement, or any type of contract with a funeral director – *need original signed document*
- ❑ Bank statements from all bank accounts for past three years, including accounts that have since been closed, and including accounts in either spouse's name
- ❑ Recent invoice from payment of health insurance; if health insurance is included in the pension benefit, verification of company coverage
- ❑ Other financial assets, in either spouse's name: statements from last three years for stocks, bonds, certificates of deposit, brokerage accounts, money market, IRAs, annuities, including accounts that have since been closed – with notes by each withdrawal over \$100 explaining briefly what money was used for, i.e. personal expenses, gift, transferred to another account (if transferred to another account, please provide detail)
- ❑ Verification of any gifts made in last three years with value in excess of \$100, and verification of where gift was deposited, i.e., endorsed side of check or statement of deposit to recipient's account
- ❑ Home, if applicable: most recent deed and summer and winter tax bills
- ❑ Other shelter costs: rent receipt, most recent utility bills, and homeowner's insurance
- ❑ Property other than financial or residence, verification of existence and value (automobile, for example)
- ❑ Verification of social security income, usually statement of income amount received late December or early January each year
- ❑ Verification of pension, VA, or any other income received