



Thank you for scheduling an appointment to discuss Medicaid planning. The following information would be helpful for the first meeting and is required if a Medicaid application is filed. The information is for the Medicaid applicant and the applicant's spouse (if applicable).

Photocopies can be made at our office at the time of the appointment. If you can't find the requested information, we can work to gather it later. If you have any questions or concerns about the information requested, please feel free to contact John J. Rizzo III at (231) 947-6800.

PERSONAL RECORDS

- Social Security card (photocopy front and back)
- driver's license or state identification card (photocopy front and back)
- health insurance cards (photocopy front and back)
- Medicare card (photocopy front and back)
- copy of birth certificate
- copy of power of attorney
- name, address, and phone number of the nursing home (if applicable)

ASSET RECORDS

- copy of deeds to all real estate
- titles to any vehicles
- land contract document and payment schedule
- value for the land contract
- documents for burial plots (if you own any)
- documents for funeral contracts (if you own any)

- bank statements (checking, savings, money market, or CD) for the past three months
- copies of all life insurance policies (account numbers, addresses, and phone numbers) and the cash surrender values of these policies as of the date of the appointment.
- copies of all stock certificates, annuities, IRAs, or mutual funds (account numbers, addresses, and phone numbers) and the cash surrender values of these accounts as of the date of the appointment
- copies of all saving bonds and the cash surrender values of these accounts as of the date of the appointment.

INCOME RECORDS

- evidence of Social Security or Supplemental Security income (copy of a check or a Social Security benefits letter)
- evidence of pension from former employers

HOUSEHOLD EXPENSES

- copy of current mortgage statement
- property tax statement for your home for the past year (summer and winter taxes)
- copy of rent or lot statement
- homeowners insurance statement
- current bills or receipts for gas and electric
- health or medical insurance premium

GIFTS AND DATE OF ADMISSION

- verification of all divestments (gifts) over \$500 that have been made in the last five years (copies of checks or bank statements)
- copy of the nursing home Fact Sheet for showing date of admission to the nursing home or hospital (if applicable)