



Tom Willoughby, JD

Tom.WilloughbyJD@gmail.com

<http://TheRetirementRescuer.com>

Off: 407.977.9171 Fax: 321.296.7125



DOCUMENT CHECKLIST

Below are items we believe you will need to gather to provide to Medicaid for their review to determine your eligibility.

- Social Security Card
- Proof of alien status
- Medicare card and any other health care cards
- Paid & Unpaid medical bills for claimant
- Bill/receipt from Living Facility, if moved in
- Living Facility paperwork – usually handled by residence, however
- Motor vehicle-title and registration for car, motorcycle, truck, van, boat, etc.
 - Provide proof of balance due on any of the above vehicles
- Mobile home owner - title and registration and most recent tax notice
- Property owner - deed or most recent tax notice and mortgage papers on ALL property
- Mortgage owned by Medicaid claimant - copy of mortgage and amortization table
- Cemetery lot(s) - deed
- Life insurance policies - copies of cover pages for all policies
- Annuities, IRA's, 401 K's, or retirement funds
- Copy of pre-paid funeral, burial, or cremation agreement
- Bank accounts - (checking, savings, CD, money market, credit union) copies of last 3 months statements on ALL accounts
- Most recent tax return for self-employment income
- Documentation of Social Security benefits and claim number
- Documentation of Supplemental Security Income (SSI) benefits and claim number
- Documentation of most recent monthly gross VA benefit and claim number
- Documentation of currently gross monthly Civil Service Annuity, private pension or other income (check stub, award letter or letter from payor)
- Proof of all interest amounts paid on all bank accounts
- Savings bonds, other bonds, stocks owned, value as of these, frequency and amount of last dividend/interest payment

Please note, this list has items not applicable to your situation. Alternatively, the list **MAY NOT** include all needed. During the eligibility determination process, Medicaid may determine the need for additional documents that are not indicated above.

- Tom Willoughby