

What to bring for our first meeting regarding Medicaid / Family Care Planning

We would like you to bring the information listed below when you come to our first meeting. Items with an asterisk* should be provided at least five days ahead of the meeting if possible. These can be provided by email, fax or sent in.

If you are unable to gather some or all of this information, do not worry, we can still have your appointment. However, it is likely that you will need to collect at least some of the information in order for us to give the most accurate advice.

- *1. Copies of existing estate planning such as powers of attorney, trusts, will;
2. Current values on all bank accounts and liquid assets, such as checking and savings, certificates of deposit, money markets, retirement funds, and investments. Shares and value of stocks, bonds;
3. Life insurance policies with current face and cash values, and copies of any annuities along with the value and whether they are currently paying out;
4. Verification of income (Social Security, pensions, interest, rent, Railroad Retirement, etc., and copies of checks, 1099s or statements);
5. Information regarding real estate owned (tax statement of all properties, amount of any outstanding mortgage or home equity loan, amount of homeowners association dues, whether any real estate was transferred in the last five years, copies of deeds if available, copies of any land contracts);
6. Burial information (prepaid plans, burial trusts, cemetery plots owned, etc.);
7. Dates and amounts of any gifts given in last five years, and any payments to family members for caregiving;
- *8. If a business is owned: full name, address and 2 most recent years of tax returns, plus profit and loss statement for months after last tax return.