### ASSET PROTECTION LIST- Single

In order to get a good idea about the assets you have and to properly advise you in protecting them, the following documents would be helpful for our discussion:

**Income/Medical Expenses/Gifts:**

1. Social Security income verifications;
2. Pension income verifications;
3. Income verifications for any rental houses you may have;
4. Verification of health insurance premiums paid;
5. Any medical bills that are outstanding;
6. At least the most recent tax return. If gifts given in prior years, may need past 5 years of tax returns when available.

**Resources/Assets:**

1. Resource verifications including bank accounts, CDs, Brokerage accounts, or any other asset - need statements for the past 3 months;
2. Life Insurance Policies including recent cash surrender values;
3. Annuity statements - and if possible the policies;
4. Government bonds;
5. Certificate of Title for vehicles, mileage and model of vehicles;
6. Deeds to any real property owned, property tax statements;
7. Prepaid funeral documents and cemetery plot;
8. Verification of any gifts made within the last 5 years.
9. Long Term Care Insurance Policy

**Legal Documents/Disability**

1. Legal documents, i.e., Power of Attorney, Trusts, Wills
2. Any trust where funds are held for your benefit
3. Disability papers if anyone in immediate family (spouse or children) is disabled.

**General Documents Used for Medicaid or Veteran’s Benefits Applications:**

1. Birth certificate **and** Driver’s License or State ID;
2. Spouse’s Death Certificate or Divorce Decree;
3. Social Security card, Medicare card, health insurance Supplemental cards;
4. Military Discharge Paperwork or DD214 for yourself or deceased spouse;

**It would be very helpful if you could bring these items in the order of the list for ease in copying and to expedite a quicker process in preparing for your consultation.**