



## **Brauman Moore and Harvey Law Offices**

### **Returning Clients:**

**If we already have your asset information, we will only need updated balances for your accounts. If you have opened new accounts or account balances have changed, it would be helpful to have that information at your appointment.**

### **Medicaid/VA Planning Clients:**

To file an application for benefits we must have the following documents prior to filing an application. If you are having trouble locating these documents, please do not cancel the appointment. Let our assistant know what you are having trouble with and we may be able to give you ideas or assist with obtaining the document(s).

### **Income/Medical Expenses:**

1. Verification of income from any source including: Social Security, Retirement/Pension, annuities, Earned Income (from employment), Rental Income, Etc.
2. Verification of health insurance premiums paid
3. Most current tax return

### **Resources/Assets/Gifting**

4. Resource verifications: **most recent statement** for each account (past 3 months' for Medicaid)
  - Bank accounts, CDs,
  - Brokerage/Investment Accounts,
  - Retirement Accounts,
  - Stocks or Bonds,
  - Life Insurance Policies including recent cash surrender values and death benefit;
  - Annuity statements – and, if possible, the policies;
  - Title or registration for vehicles
  - Deeds to any real property owned, and/or property tax statements,
  - Prepaid funeral documents front and back of all pages; Cemetery plot
  - Statements for any other assets
5. Proof or list of any gifts made in the last 5 years
6. Long term care insurance policy

### **Legal Documents/Disability**

7. Legal documents, i.e.; Power of attorney, Trust, Wills
8. Disability paper if anyone in immediate family (spouse or children) is disabled.

### **General Documents Used for Medicaid Applications:**

9. Birth certificate and Driver's License or State ID;
10. Proof of Marital Status (Marriage certificate/License, Spouse's death certificate or Divorce Decree)
11. Social Security card, Medicare card, health insurance Supplemental cards
12. If married - home owner's insurance, mortgage statement, rental agreement, and one utility bill

*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.*