ASSET PROTECTION LIST- Couple

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 for both parties;
2. Pension income verifications for either spouse;
3. Income verifications for any rental houses you may have;
4. Income from current employment if working;
5. Verification of health insurance premiums;
6. Any medical bills that are outstanding;
7. Utility bills for housing;
8. 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 first date of institutionalization and 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, Homeowner’s insurance;
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 Certificates **and** drivers’ licenses or Baptism Certificates for both parties;
2. Marriage Certificate; Death Certificate if applicable;
3. Divorce Decree if applicable;
4. Social Security cards, Medicare cards; health insurance supplement cards for both parties;
5. Military Discharge Paperwork or DD214

**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.**