**DOCUMENTS TO BRING TO MEDICAID or
HEALTH CARE COST CONSULTATION
(Lawyer will review at meeting)**

CALL IN INFORMATION IN ADVANCE

In addition to bringing the following documents with you to your appointment if possible, please also call in a day or two before your appointment, and let the attorney's staff know the address of any real estate in which the ill person or his or her spouse has any interest, so that the attorney can obtain copies of deeds before his meeting with you. [] Done

****

BRING IN WITH YOU IF POSSIBLE

____ Completed **BUDGET OF WELL SPOUSE** (download from this website) if ill person is married.

OTHER DOCUMENTS TO BRING IN IF POSSIBLE

Please bring any of the following documents that you can locate to the first consultation.

____ Power of Attorney.

____ Trust.

____ Will.

____ Health Care Advance Directive, Health Care Power of Attorney, or Living Will.

____ List of assets owned by ill person ***and/or*** spouse.

____ Any documents received from, or filled out for, Senior Services, Medicaid, or similar offices.

____ Bank, insurance product, and brokerage statements.

____ Written evidence of actual pension income and actual Social Security income of ill person ***and/or*** of spouse (i.e. copies of annual statement for Social Security if available, copies of checks, copies of bank statements, etc.).

____ Nursing home or facility contract.

____ Health insurance policy (pamphlet, enrollment materials, retiree plan materials, etc.).

____ Deeds to real property.

____ Property tax statements.

____ Copies of savings bonds.

____ Copies of IRA and 401k statements, and beneficiary designations.

____ Life insurance policy, cash value statement, and beneficiary designation.

____ Annuity contracts.

____ Real estate contracts.

____ Documents re any loans or notes from or to person.

____ Any information available as to health condition, diagnosis, and prognosis of the ill or elderly person(s).