

Client Name: _____

Due Date: _____

Documents Needed for Medicaid/VA Planning

*****In order for the Edwards Group Process to begin we MUST have sufficient income/bank information**

Health

- Medicare card (front and back)
- Medicare Supplemental card and Medicare Part D card (front and back of both)
- Medicare Supplemental monthly premium statement (Current Year Statement)
- Medicare Part D monthly premium statement (Current Year statement)
- Facility invoice or in-home caregiver bill
- Long-Term Care insurance policy statement

Personal

- Birth Certificates
- Death Certificate for spouse (if applicable)
- Marriage license
- Photo ID
- Social Security card and/or passport
- Pre-paid burial contracts and deed
- Military discharge papers (for VA Planning)
*military discharge must be the original or certified copy
- Vehicle title(s); mobile home title(s); boat, RV, etc. title(s)

Investments

(5-year monthly history on all investment accounts for Medicaid)

- Retirement statements [IRA, 401(k), 403(b)]
- Certificate of Deposit (CD) receipt and history
- Annuities
- Investment accounts/brokerage accounts
- Stocks, bonds (EE, H, I savings bonds)
- Mutual funds
- Business interests

Financial

- **Income statements** (Social Security benefit, pension, survivor pension)
*automatic deposit does NOT suffice as proof
- Bank statements: _____
*please make sure to include check copies and **IMAGES** of "items of deposit" greater than \$1000
- Online account access to information from banks and other financial institutions (when available)
- Life insurance policy
- Income tax returns: _____
*if no tax returns filed, then 1099s for each year
- Safe deposit box information
- List of any monetary gifts made to others in the past 5 years

Real Estate

- Mortgage note
- Real estate deed(s) & tax bill(s)
- Any outstanding debts or creditor statements

Current Legal Documents

- Current will and/or trust(s)
- Power of Attorney for property & Health
- Guardianship (if applicable)



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