



Documents Required for Medicaid

1. Assets

- Last 3 months of statements for:
 - All active bank accounts: checking, savings, money market, CD's, etc.
 - All stocks, bonds, IRA's annuities, brokerage/investment accounts
- Annuities and life insurance: Full contract or statement showing purchase date, current value, surrender value & death benefit
- Car title or registration, with proof of insurance
- Copy of deed for any real estate owned
- Documentation for any other assets, real or personal, owned by applicant

2. Income

- Letter from Social Security Award Letter stating applicant's gross income
- Verification of Pension income – Letter/statement from company that states name, gross income amount, and deductions (if any) – must be from year the application will be submitted or indicate it is a lifetime payment
- Verification of gross monthly income from any other source

3. Identification Cards

- Government issued photo identification
- Social security card or number
- Medicare card
- Medicare D card
- Supplemental or Medicare HMO card
- Verification of date of birth
 - Birth certificate if you have one
- Copy of marriage certificate if you have one or date of marriage
- Proof of citizenship – if not born in U.S.
- VA discharge papers (DD214) - If applicant or spouse is a veteran

4. Health and Long Term Care Insurance

- Supplemental health insurance premium statement – must show name of insured, monthly premium amount, and reflect year in which Medicaid application will be submitted
- Copy of summary of health care benefits
- Copy of summary page for long term care insurance

5. Estate Planning Documents

- Copies of Durable Power of Attorney / Guardianship Letters / Last Will and Testament / Trust / Health Care Surrogate, HIPAA Authorization and Living Will
- Copies of any funeral contracts, plots, etc.