

MEDICAID APPLICATION CHECKLIST

Please provide all information for *both* spouses if married.

- ___ Birth Certificate and/or Naturalization Papers;
- ___ Social Security and Medicare Cards;
- ___ Discharge papers or other verification of U.S. Military Service
- ___ Other medical insurance information (copy of ID card with name and phone number of the company); member and group ID numbers, plus proof of cost;
- ___ Life Insurance Policy face page and current cash surrender value;
- ___ Prepaid Funeral Contracts;
- ___ Current Social Security benefit summary statement;
- ___ Pension check stub or statement showing current gross pension and all deductions
- ___ Verification of income from rental property, Veteran's benefits, or any other income;
- ___ Tax return copies for last 5 years;
- ___ All financial statements including investment accounts and brokerage statements, retirement accounts, checking account statements and check registers, bankbooks, or CD's, securities, copies of stock certificates and bonds, including US Savings Bonds, covering transactions for 5 years prior to the application, accounting for all deposits, withdrawals or checks of \$500 or more (check copies). All assets owned in the last 5 years must be disclosed, even if the accounts are no longer active;
- ___ Gifts made in the last 5 years; evidence of withdrawals & copies of checks;
- ___ Power of Attorney, Wills, Trust Agreements;
- ___ Marriage License (Spouse's death certificate if widowed);
- ___ Auto registration or title;
- ___ Deed(s) for real property, real property tax bill, and homeowner's insurance bill;
- ___ Unpaid medical bills;
- ___ Monthly rent or mortgage payment;
- ___ Several years ago, Anthem BC/BS, Prudential, John Hancock, and Metlife, went through a demutualization process that included shares of company stocks being issued to most policyholders. Provide documents showing number of shares received. If cashed in, document value and date.