

Request for Documentation – Medicaid

In order to make application for _____ we will need the following items:

- Marriage Certificate
- Death Certificate
- Copies (front and back) of the Social Security card, Medicare card, Health Insurance card and Driver's License or State ID (BOTH SPOUSES)
- Proof of all income sources (Not from a bank statement)
- Proof of Long Term Care Insurance
- Proof of all health insurance premiums (Not from a bank statement)
- Prepaid Funeral Arrangements including Funeral Trusts
- Bank statements for the last three months from all accounts. They must be complete statements with all pages. Computer screenshots are not accepted by Medicaid
- All Financial Statements (Brokerage accounts, annuities, IRA Accounts, etc.) for the last three (3) months (BOTH SPOUSES)
- Property Deeds or copy of last property tax statement
- Registration or Titles for all vehicles
- Copies of all checks written in the 30 days prior to application date
- Legal Documents (Will & Financial POA)
- Proof of Gifts made within the last three years (\$2,000 or more)
- For the Non-Applicant Spouse: proof of costs of rent/mortgage, real estate taxes, Homeowners or Renters insurance and utility bills
- Statement showing "closed" from bank/financial institution for each account closed. A \$0 balance is not accepted by Medicaid

These items will be needed to determine eligibility for benefits. Due to the length of the entire process, we will most likely need additional documents and bank statements. Please don't hesitate to call with any questions.

Thank you,
Bridgette Pemberton, Medicaid Case Manager
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