



EIN NO: 55-0819817

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 Elder Law | Special Needs Law | Estate Planning
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Document Checklist for Public Benefits Eligibility

Categorical Eligibility: We must prove your status regarding certain matters. Please provide us with at least one document in each of the following categories. **More is better** so if you have additional documents, please provide them.

Citizenship:

- Passport
- Birth certificate
- Naturalization papers
- Alien registration card
- Adoption decree

Age:

- Passport
- Birth certificate
- Driver's license
- Baptism certificate

That you are you:

- State issues photo ID
- School ID
- Military ID

Marital status:

- Marriage license
- Separation Order
- Divorce Order
- Spouse death certificate

Medical Eligibility: After you are admitted to a nursing home, or if you need home health care, then proof of your medical condition will be necessary. We will need you to sign a release so we can get that information.

Financial Eligibility: Please provide all of the following that apply to you or your spouse:

Resources (Assets with value):

- Checking accounts (3 months of statements & checks)
- Savings accounts (3 months of statements)
- Money markets (3 months of statements)
- CDs
- Stocks or Bonds
- Annuities
- Retirement accounts (e.g., 401(k) or IRA)
- Deeds to land and buildings
- Titles & registration to vehicles or mobile homes
- Debts people owe you
- Trusts of any kind that involve you
- Life insurance (all policies)
- Burial assets (e.g., contracts, accounts, plots)
- Anything else you believe has value. The Medicaid rule is that if it's not exempt, then it counts toward eligibility so err on the side of caution and tell us.

Monthly Income:

- Recent check from employment
- Social Security letter (you get one each year)
- Railroad Retirement
- Disability Income
- Proof of pension or retirement income
- Rent payments
- Support, alimony
- VA Award letter
- SSI award letter
- Debt payments (money people owe you)

Other things we need:

- Current Last Will & Testament
- Power of Attorney/Guardianship papers
- Social Security Card
- Medicare card (front and back)
- Other health insurance card & premium amount

As we work for you, other information may be helpful. Please provide:

- ID cards for both spouses
- Utility bills
- Property tax bills
- Mortgage statement or rent bill
- Any other insurance
- Evidence of any medical debt

If you have any questions, please let us know. Call at (706) 428-0888 or email info@mcguffey.net.