PEARSON BOLLMAN LAW

Medicaid (Title 19) Eligibility Document List

The information we need to determine Medicaid (Title 19) eligibility is below. Further, we will need four months of this information. For example, for bank accounts, we will need four months of bank statements. Lastly, for items such as life insurance, we will need a letter from the insurance company with the cash value, face value, and when the policy was taken out. Please bring the following documents to your initial client meeting:

- Documentation of all assets (four months of documentation)
  - Insurance policies, if any, including life insurance policies, annuity contracts, long term care policies (we need cash value amounts, not death benefit amounts on these policies)
  - Cash, bank accounts, CDs
  - IRA, Keogh, and 401k accounts
  - Stocks, bonds, mutual funds
  - Value of business assets
  - Real property (not your home)
  - All other property
- Documentation of all income (four months of documentation)
  - Social security
  - US Civil Service
  - US Railroad Retirement
  - Military Retirement
  - SSI/Public Assistance
  - All other income
- Current Will and/or Powers of attorney
- Vehicle information (year, make, model, value)
- Signed Authorization to Release Information (signed in initial meeting)
- Copies of Social Security Cards, Medicare Cards, and any additional insurance cards, for example, Wellmark Blue Cross Blue Shield coverage.

Do not be concerned if you are unable to provide all of the information requested above. The list is designed to cover all clients, and therefore it is possible that not all of the items listed will be applicable. Please bring as much of the information and as many documents as you are able to assemble to our meeting.