

MEDICAID PLANNING CHECKLIST

- Funeral Cost Estimate and Pre-Need Funeral Plan Documents
- Letter of Irrevocable Assignment
- Social Security and Pension Statements
- VA Benefits and Disability Documents
- Bank Statements (Last 4 Months)
- 401K, Stock, Bond, and IRA Information
- Annuity Policy Documents
- DD214 Discharge Document (for Veterans)
- Marriage and Death Certificates
- Driver's License and VA ID Card
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- Primary Residence Documents (Homeowners Insurance, Property Tax Notice)
- Mineral/Oil Rights or Royalties
- Current Mortgage, Loan, or Reverse Mortgage Documents
- Life Insurance Policies (Policy Number, Value, Statements)
- Health Insurance Cards and Medicare Cards
- Power of Attorney or Legal Documents (Trusts and Schedules of Assets)
- Cemetery Deed for Burial Plots
- Recent 1099s, W-2s, and Other Tax Documents

