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Client Name: _____

AGED recommends that you have the following items available when applying for Medicaid. Note applications and required documentation vary by individual, and as such this list may not include all items that Medicaid requests. However, these are the most commonly requested items.

Authority Documents

- Letters of Guardianship, if applicable
- Power of Attorney

Identification Documents

- Driver's License
- Social Security Card

Medical Documents

- Medicare Card
- Secondary Medical Insurance Card(s)
- Other Medical Insurance Card(s)
- Unpaid medical bills for 3 months prior to application, including dates of service

Financial Documents

- Bank Statements – 3 months of statements for any checking, savings, CD, money market, or other type of account for which the individual appears solely or jointly. **Must include all pages of statement, even pages intentionally left blank.**
- Brokerage account statements, stocks, bonds, or IRA statements showing values and last dividend or interest payment.

- Proof of Annuities, such as last annual statement
- Life Insurance Documents with Cash Value, Face Value, and most recent annual statement.

Income Documents

- Proof of Social Security Benefits – most recent Social Security Benefits Award letter, typically sent in December for the upcoming year. You can get an updated letter from Social Security if needed.
- Proof of VA income – original award letter or current letter from VA. Note: Aid & Attendance amounts must be shown separately.
- Proof of Pension Payments – pay stubs or a letter from the pension administrator with amount and frequency of payments.
- Proof of other income sources, if applicable.
- If you are self-employed, will need income verification such as last year's tax return.

Funeral / Burial Documents

- Pre-paid funeral, burial, or cremation contract agreement, (copy only) contract **must be listed as irrevocable.**
- Burial Plot / Cemetery lot contract (copy only)

Property

- Real Property - Amount owed on mortgage, such as the most recent mortgage statement
- Real Property - value of real property, such as tax assessment
- Real Property - Proof of Property for Sale – copy of listing, may be obtained from realtor
- Vehicle – Year, make, model of vehicle
- Vehicle – amount owed on vehicle
- Vehicle – value of vehicle, such as Kelly Blue Book value

Medicaid Forms

Note AGED will provide the following forms

- Authorization of Designated Rep
- Financial Release Authorization
- Medical Records Release

Trust Documents

Note AGED will provide the following documents

- DCF / SSA Regs *provided with AGED Welcome Letter
- Joinder Agreement
- Master Trust
- Receipt of Trust Funding
- Trust Statements for last 3 months, if applicable