

Client Name: \_\_\_\_\_

AGED recommends that you have the following available when applying for Medicaid.  
*Note: required documentation varies by individual. This list may not include all items that Medicaid requests. If married, information needs to be provided for both spouses.*

### **Authority Documents**

- Letters of Guardianship, if applicable
- Power of Attorney

### **Identification Documents**

- Picture ID
- Social Security card

### **Medical Documents**

- Medicare card
- Secondary medical insurance card(s)
- Medical records – If Disability Determination is required.

### **Financial Documents**

- Bank statements – 3 months of statements all checking, savings, CD, money market, or any other type of account, on which the individual appears solely or jointly. *Must include all pages of statement, even pages intentionally left blank.*
- Brokerage account, stocks, bonds, or IRA statements showing values and last dividend or interest payment.
- Proof of annuities or other retirement accounts, such as last annual statement
- Life insurance documents with cash value and face value (for current year).

## **Income Documents (Current Year)**

- 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. (1099 is not sufficient)
- Proof of VA income – original award letter or current letter from VA.  
*Note: Aid & Attendance amounts must be shown separately.*
- Proof of pension – pay stubs or a letter from the pension administrator
- Proof of other income sources, if applicable.
- If you are self-employed; income verification, such as last year's tax return.

## **Funeral / Burial Documents**

- Pre-paid funeral, burial, or cremation contract. Contract should be **irrevocable**.
- Burial plot/cemetery lot contract.

## **Property**

- Real Property:
  - Amount owed on mortgage.
  - Value of real property.
  - Proof of property for sale.
- Vehicle:
  - Year, make, model of vehicle.
  - Amount owed on vehicle.
  - Value of vehicle.

## **Medicaid Forms** *\*Note AGED will provide the following:*

- Authorization of Designated Representative
- Financial Information Release (If married, both spouses must sign)
- Medical Records Release
- AGED Community Partner Release
- Authorization to Disclose Information

## **Trust Documents** *\*Note AGED will provide the following:*

- Joinder Agreement
- Master Trust Declaration
- Receipt of trust funding
- Trust Statements for last 3 months, if applicable