



## DOCUMENTS REQUIRED FOR MEDICAID APPLICATION

- ❖ Birth Certificate or Baptism Certificate
- ❖ Citizenship (naturalization papers, green card or voter registration)
- ❖ Medicare Card and or Health Insurance cards such as BCBS Medex, Fallon
- ❖ Most recent Health Insurance Premium Bill and proof of payment
- ❖ Income Tax Returns for past 2 years- Federal Only
- ❖ Income:
  - Social Security
  - VA Checks
  - Annuity Checks
  
- ❖ Assets: Checking- Savings- CD's- Stocks- Bonds- Investment Accounts, Mutual Funds, **Passbook Accounts, Statement Accounts and Checking Statements must be provided for 3 years.** Information on all accounts opened or closed should be provided. Verify deposits, withdrawals, and checks for \$1000.00 or more.
- ❖ Life Insurance Policies, Annuities, and contracts. **Provide statements from companies verifying current cash surrender value if policies total \$1500.00 or more.**
- ❖ **Legal Documents:** Trust(s), Power of Attorney, Guardianship
- ❖ Pre-Paid Burial and/or Burial Account (up to \$1500.00 in burial account)
- ❖ Real Estate: Deed(s)- Real Estate Tax Bill- Homeowner's Insurance- Current Heat and Electric Bills
- ❖ Automobile Registration or Title
- ❖ Transfer of Assets Provide verification of transferred assets or property with in the last 36 months.
- ❖ Spousal Expenses: Rent receipt, mortgage payment or condo fee

\*PLEASE PROVIDE VERIFICATIONS FOR HUSBAND AND WIFE IF APPLICANT IS MARRIED