

DOCUMENTS REQUIRED BY MEDICAID OFFICE

1. Copy of Driver's License of Applicant and spouse if married - need FRONT and BACK
2. Copy of Medicare Card of Applicant and spouse if married - need FRONT and BACK
3. Copy of Social Security Card of Applicant and spouse if married - need FRONT and BACK
4. Copy of Medicare Supplemental Insurance card and any other health insurance cards of Applicant and spouse if married - need FRONT and BACK
5. Proof of military service (must show dates of service) of Applicant and spouse if married - usually DD 214
6. Latest statement showing current income including Social Security of Applicant and spouse if married - 1099s or tax returns are not accepted by the State as proof of income.
7. Bank Statements for two years of Applicant and spouse if married including joint accounts - ALL pages needed - best organized by month and year - your bank or credit union will provide any that are missing (they may charge for the copies) - if the account is held in a Trust then we need two years
8. Brokerage account statements for two years of Applicant and spouse if married including joint accounts - ALL pages needed - best organized by month and year - if the account is held in a Trust then we need two years
9. Statements from all other financial accounts for two years of Applicant and spouse if married, including joint accounts - if the account is held in a Trust then we need two years
10. Proof of amount of health insurance premiums being currently paid - can not use bank statement or pay stub showing deduction.
11. All documents pertaining to transfers of any property for last 2 years (autos, real property, cash, stocks, bonds etc. including gifts made)
12. Statements from knowledgeable sources on the fair market value of any property transferred within the last 2 years

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13. Copies of registration to vehicles of Applicant and spouse if married and copies of Titles if available.
14. Copies of deeds to all real property of Applicant and spouse if married
15. Copy of burial plan with statement that plan is **irrevocable** (meaning that it can not be cancelled and a refund received) of Applicant and spouse if married
16. Copies of life insurance policies of Applicant and spouse if married. Must also have a statement or letter showing **cash value** of all policies that have a **face value** over \$2,500 – even if the cash value is zero, we must have a statement or letter proving it.
17. **If married** copies of three most recent utility bills to include ONLY water, electric, gas, sewer and trash pick-up.
18. **If married** and paying rent, copies of three most recent rent receipts and proof of renter's insurance premium amount if insured.
19. **If married** and own a home – need proof of monthly mortgage payment amount (statement, coupon book), need proof of amount of homeowner's insurance premium, proof of amount of real property taxes, proof of amount of homeowner's association fees (if any).