

MEDICAID APPLICATION: FINANCIAL CHECK LIST



Proof of benefits (Social Security, Railroad Retirement, VA, etc.)

- Benefit letter for current year (You may not use a bank statement.)
- Social Security, toll-free: 1-800-772-1213 OR www.ssa.gov
- VA income: If any is from Aid and Attendance, provide proof in writing showing how much income is from Aid and Attendance.

Proof of other income (pension, 401(k), IRA, rental, farm, self-employment)

- Pensions: A pay stub or letter from the pension agency
- Rental: Copy of lease, proof of expenses, signed letter FROM WHOM stating who receives the rental income
- If you are 59 ½ or older, you must take required minimum distributions (RMDs) from 401(k) or IRA accounts to be eligible for Home and Community-Based Waiver Medicaid. If applicable, please provide proof of RMDs and the amount.

Copy of health insurance card(s)

Copy of Medicare Part D card and proof of premium

Proof of premium payments for health insurance

- Canceled check OR bank statement showing direct withdrawal OR recent letter from the insurance company showing the current premium
- If the insurance covers a family, provide proof of how much of the premium is for the person seeking Medicaid.

Three months of bank statements for all checking and savings account

- ALL pages are required.
- Call your bank for missing statements – or print them if you can access your account online.

Proof of other assets, if any

- Certificates of deposit
- Stocks and/or bonds
- Letter explaining contents of any safe deposit boxes or other assets, such as cash
- Trust documents, if any (including proof of value)

Copies of all life insurance policies

- Fact sheet showing policy number and date and name of insured
- Current cash value

Copy of pre-paid funeral arrangements, if any

- Itemized funeral goods and services sheet
- Proof of how the arrangements were paid for, including how much has been paid so far
- Additional documents may be required, depending on how the funeral was paid for.

