

**ISENHOUR SENIOR SERVICES
DOCUMENTATION REQUIRED FOR MEDICAID APPLICATION**

"PRIOR" TO PHONE CONSULTATION, you must send your information to one of the following:

FAX:(239)542-7388 - OR-

Email: JOE@ISENHOURENIORSERVICES.COM

FOR AN OFFICE CONSULTATION - PLEASE BRING ALL DOCUMENTS TO THE CONSULTATION

*** Please note: ALL documents are needed for Applicant and Spouse**

Please Include ALL PAGES OF EVERY FINANCIAL or BANK STATEMENT - INCLUDING BLANK PAGES

PROOF OF AGE, IDENTITY AND CITIZENSHIP	MARITAL STATUS	PROOF OF RESIDENCE	SOCIAL SECURITY
<ul style="list-style-type: none"> * ONLY ONE FORM OF ID IS REQUIRED * A Birth/ Baptismal Certificate * OR A US Passport 	<ul style="list-style-type: none"> *Marriage License IF your spouse is living. 	<ul style="list-style-type: none"> *Copy of Deed and Tax Statement / Homestead 	<ul style="list-style-type: none"> *Copy of SS card IF- you have it.
<ul style="list-style-type: none"> OR a Photo ID (License,Military ID*State ID 	<ul style="list-style-type: none"> *Spouse's Death Cert. If deceased spouse is 1st on legal documents 	<ul style="list-style-type: none"> *Apartment Lease *Rent Receipt 	<ul style="list-style-type: none"> We Need The correct SS # at a MINIMUM.
<ul style="list-style-type: none"> *OR Naturalization Papers AND/OR * Marriage License for Applicant born outside of the US *OR an Alien Registration Card 			

HEALTHCARE COVERAGE	LEGAL DOCUMENTS
<ul style="list-style-type: none"> *Medicare Card *All Other Health Insurance Cards 	<ul style="list-style-type: none"> *POWER of ATTORNEY
<ul style="list-style-type: none"> **Copy both sides of all cards** 	<ul style="list-style-type: none"> *TRUSTS *Wills
<ul style="list-style-type: none"> *Proof of health insurance premiums from source (bank statement not acceptable) 	<ul style="list-style-type: none"> *Mortgage Receivable (Mortgages OWNED by you - Not the bank)
<ul style="list-style-type: none"> *Long Term Care Policies 	<ul style="list-style-type: none"> * Any pre-existing Burial / Cremation Contract

GROSS INCOME VERIFICATIONS	NOTES
<ul style="list-style-type: none"> *SS or SSI or SSDI Benefit Letter 	<ul style="list-style-type: none"> *Support/alimony
<ul style="list-style-type: none"> *Pension Benefit letter 	<ul style="list-style-type: none"> *Workers Comp
<ul style="list-style-type: none"> *VA Benefit letter (VA Break Down letter for Aid and Attendance) 	<ul style="list-style-type: none"> *Rental income & expenses from income producing property
<ul style="list-style-type: none"> *Most recent payroll Record -1 Mo. 	<ul style="list-style-type: none"> *Unemployment (1 month)
<ul style="list-style-type: none"> *Annuity checks 	
	<ul style="list-style-type: none"> Proof of SSD application for those under 65 And not on disability yet.

EXPENSES MONTHLY	NOTES
<ul style="list-style-type: none"> *Mortgage 	<ul style="list-style-type: none"> *Support Payments
<ul style="list-style-type: none"> *Rent 	<ul style="list-style-type: none"> *Loan Payments
<ul style="list-style-type: none"> *Home or Renters Insurance 	
<ul style="list-style-type: none"> *Water, Sewage, Gas, Oil, Phone 	<ul style="list-style-type: none"> *Unpaid Nursing Home Bills
<ul style="list-style-type: none"> *Real Estate Tax 	<ul style="list-style-type: none"> *Condo Maintenance Fees
	<ul style="list-style-type: none"> ***Last 3 months

ASSETS		
<ul style="list-style-type: none"> *Checking Account Statements 3 Months) 	<ul style="list-style-type: none"> *Money Market Accounts 	<ul style="list-style-type: none"> *Vehicles, Boats, RV, etc title or reg.
<ul style="list-style-type: none"> *Savings Account Statements 3 Months) INCLUDING CLOSED Ck. + Savings Accounts 5Yrs 	<ul style="list-style-type: none"> *Annuity Statement 	<ul style="list-style-type: none"> *Deeds, Tax Statements to Properties Owned
<ul style="list-style-type: none"> *Stock/Bonds Statements (3 months) *Certificates of Deposit 	<ul style="list-style-type: none"> *Business Assets, Cash Settlements Law Suits) 	<ul style="list-style-type: none"> *Proof of Properties Sold or Transferred within the <u>last 5 years</u>
<ul style="list-style-type: none"> *IRA, 401k, 403b, Keogh Accounts Proof of Required Minimum Distribution 	<ul style="list-style-type: none"> *Land/Real Estate Sale Statements 	<ul style="list-style-type: none"> *Life Insurance Cash Value Statements