

## **Medicaid Materials Needed – Married Couples**

In order to prepare a Medicaid application, we will need the following materials, as applicable. There may be other items needed, but those will be requested when needed.

1. A copy of the Medicaid applicant's and spouse's Social Security cards (front and back);
2. A copy of the Medicaid applicant's and spouse's Medicare cards (front and back);
3. A copy of the Medicaid applicant's and spouse's drivers' licenses or other photo identification;
4. A copy of the Medicaid applicant's and spouse's birth certificates;
5. A copy of their marriage certificate;
6. A copy of the Medicaid applicant's and spouse's supplemental health insurance cards (front and back) and a statement from each insurance company verifying the premiums each of them pays each month;
7. If the Medicaid applicant or spouse is enrolled in a Medicare Part D prescription plan, please provide us with a copy of each prescription card (front and back) and a statement from each insurance company verifying the premiums each of them pays each month;
8. A copy of each regular monthly statement received from the bank for each of the Medicaid applicant's and spouse's checking, savings and investment accounts for the three (3) months prior to the month of eligibility, forward, and continuing until he/she is formally approved for Medicaid;
9. A copy of each of the Medicaid applicant's checkbook and savings registers for the three (3) months prior to the month of eligibility, forward, and continuing until he/she is formally approved for Medicaid;
10. A copy of each of the Medicaid applicant's and spouse's life insurance policies, annuity contracts, and long-term care policies, as applicable;
11. A copy of the deed(s) to any real estate the Medicaid applicant and/or spouse owns;

12. A copy of the deed(s) for any cemetery lot(s) the Medicaid applicant and/or spouse owns;
13. A copy of the title(s) to (each of) the Medicaid applicant's and spouse's vehicle(s) and an appraisal (for each) performed by an authorized car dealer, on the dealer's letterhead, signed by the dealer;
14. A copy of all documents pertaining to the Medicaid applicant's and spouse's prepaid funeral arrangements (including a copy of the policy or trust agreement, the itemized statement of goods and services selected, and the irrevocable assignment of the policy to the funeral home);
15. A copy of one month's utility bills;
16. A copy of the Medicaid applicant's and spouse's most recent Federal Income Tax Return, including all schedules;
17. A copy of the Medicaid applicant's and spouse's most recent real estate tax bill(s), homeowner's insurance bill, and farm insurance bill, as applicable;
18. A copy of the lease agreement for any property for which the Medicaid applicant and spouse pay or receive rent;
19. A copy of any unpaid medical bills either the Medicaid applicant or spouse has;
20. Verification of any pension income either the Medicaid applicant or spouse receives; and
21. Documentation of any gifts the Medicaid applicant or spouse have made within the past 60 months that exceeded \$3,000 in any one month.