

Priority Elder Law Medicaid Checklist

Personal Identification

- Driver's License or Identification card
- Social security card
- Marriage certificate
- Birth Certificates
- Copy of Power of Attorney(s) Medical and/or Financial, Guardianship, or Conservator documents (if applicable)
- Health Insurance card(s) (both front and back)
- Military discharge papers

Income and Asset Information

- Proof of all income, including, but not limited to, paycheck stubs, social security and other retirement income, unemployment benefits or veterans benefits. It is important to note that DHS will require statements that show the annual benefits received.
- Current (within last 30 days) statements for all bank accounts, savings, checking, certificates of deposit, and retirement accounts. This would include IRAs and 401(k) accounts.
- Statements for all life insurance policies or annuities showing ownership, face value and current cash surrender value.
- Copies of all United States Savings Bonds
- Copy of all vehicle titles
- Copy of deeds for all real property
- Copy of Cemetery Lot Deed or burial accounts
- Copy of Prepaid Funeral Arrangements.
- Documentation of any prior gifts from applicant in the past 36 months, e.g. gifts to another for educational expenses; transfer of assets to another, etc. Please note that Michigan will not impose a look-back period longer than 36 months until after February, 2009 except for transfers to a trust, which are currently subject to a 60-month look-back period.

Liability Information

- Utility Bills
- House and car insurance policy statements
- Health Insurance premiums (personal or company paid)
- Mortgage payments or lot rent receipts
- Property taxes
- Medical bills for the last 3 months (if any)