LONG TERM CARE PLANNING

Audra B. Woods/Ryan Reck - Elder Care Attorneys

ASSET PROTECTION CHECKLIST

The following Items for EACH member of the family unit are needed to do a proper and complete anaylsis:

□ Drivers License-or State ID □ Social Security Card

□ Medicare Card

□ Health Insurance Card and monthly billing statement

□ Nursing Home Security Deposit Amount-if any and do not pay one until you consult with the attorney

□ Social Security Benefits Letter not 1099

* Please Dial 800-772-1213 (1) (3) (6)

□ Pension Statement- for each pension there is

□ Tax Bill For any Real Property (Home, Cottage, Vacant Land)

□ Life Insurance Contracts and Cash Value Statements

□ Deeds for all properties and any properties deeded or sold within the past 5 years

□ Title to Vehicles / Boats □ Prepaid Funeral Contracts

□ Power Of Attorney □ Trust Agreement/Last Will

□ Copies of Household bills if married couple:

* Gas * Trash/water/sewer
* Electric * Homeowner Insurance

□ Most Current Financial Statements including but not limited to the following:

* Bank statements * Annuity
* Stocks/Bonds * CD's
* Mutual Funds * Portfolio accounts

□ Any legal documents or medical documents you may have recently received, including Long Term Care Insurance

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