

ALTCS Document Checklist

If you choose to retain us for ALTCS and/or VA planning, the following list is an example of the documentation we will need. To expedite your case, you may bring these items with you at the time of your consultation. However, a detailed list will be provided after our office has been retained.

Please note: if married, these items apply to BOTH spouses.

- PROOF OF U.S. CITIZENSHIP, such as U.S. PASSPORT, U.S. NATURALIZATION CERTIFICATE, BIRTH CERTIFICATE(s), or ALIEN ID CARD(s)
- PROOF OF IDENTITY, such as DRIVER'S LICENSE, STATE ISSUED ID, TRIBAL GOVERNMENT ID, or U.S. MILITARY ID
- MARRIAGE CERTIFICATE, DIVORCE DECREE, and/or DEATH CERTIFICATE
- MILITARY DISCHARGE PAPERS
- MEDICARE CARD & SOCIAL SECURITY CARD
- ALL OTHER HEALTH INSURANCE/PRESCRIPTION DRUG CARD & PREMIUM BILL
- LONG-TERM CARE INSURANCE POLICY & PREMIUM BILL
- ALL PAGES OF ALL FINANCIAL STATEMENT(S) FOR THE MONTH IN WHICH THE NEED FOR LONG TERM CARE STARTED
- ALL PAGES OF ALL CURRENT ACCOUNT STATEMENTS FOR CHECKING, SAVINGS, MONEY MARKET, CREDIT UNION, CDs OR TIME DEPOSITS, INVESTMENTS, IRAs, MUTUAL FUNDS, 401(k), HSA and FSA, ETC.
- ALL STOCKS, BONDS, and SAVINGS BONDS
- ALL PROMISSORY NOTES, LOANS, or PROPERTY AGREEMENTS
- ALL DOCUMENTS FOR ITEMS SOLD WITHIN THE PAST 5 YEARS (PROPERTY, CARS, HOMES, ETC.)
- ALL PAGES OF ALL LIFE INSURANCE POLICIES INCLUDING CURRENT CASH SURRENDER VALUE, INFORCE ILLUSTRATION FROM COMPANY

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- ALL PAGES OF ALL PREPAID BURIAL PLANS or BURIAL FUNDS
- ALL DEEDS TO PROPERTY OWNED or MOBILE HOME TITLES
- PROPERTY TAX VALUATION NOTICE & HOME PROPERTY TAX BILL
- MOST RECENT RENT BILL or MORTGAGE BILL / SPACE OR LOT RENT BILL
- MOST RECENT UTILITY BILL
- HOMEOWNER'S INSURANCE BILL
- HOMEOWNER'S ASSOCIATION FEE BILL / COMMUNITY RECREATION FEE BILL
- ALL VEHICLES/ ADULT TOYS TITLES or REGISTRATIONS
- SOCIAL SECURITY AWARD LETTERS
- CHECK-STUBS FROM ANY OTHER TYPE OF INCOME YOU RECEIVE INCLUDING PENSION LETTERS, VETERAN'S BENEFITS AWARD LETTERS or RAILROAD RETIREMENT AWARD LETTERS
- LIVING TRUST
- FINANCIAL POWER OF ATTORNEY
- HEALTH CARE POWER OF ATTORNEY
- LIVING WILL
- LAST WILL & TESTAMENT