

THOMPSON, THOMPSON & GLANVILLE, PLC – ELDER LAW

LONG-TERM-CARE DOCUMENT LIST

PERSONAL RECORDS

- Social Security card (photocopy front and back)
- driver's license or state identification card (photocopy front and back)
- health insurance cards (photocopy front and back)
- Medicare card (photocopy front and back)
- copy of birth certificate
- copy of power of attorney (for finances and health care)
- copy of will, trust or other estate planning documents
- copy of the nursing home Fact Sheet showing date of admission to the nursing home or hospital

ASSET RECORDS

- copy of deeds to all real estate
- copy of property tax bill for each parcel (summer and winter bills)
- titles to any vehicles
- land contract document and payment schedule
- document for burial plots
- document for funeral contracts
- bank statements (checking, savings, money market, or CD) for the current month and also for the date of admission to a hospital/nursing home
- copies of all life insurance policies (account numbers, addresses, and phone numbers) and the cash surrender values of these policies for the current month and also for the date of admission to a hospital/nursing home
- copies of all stock certificates, annuities, IRAs, or mutual funds (account numbers, addresses, and phone numbers) and the cash surrender values of these accounts for the current month and also for the date of admission to a hospital/nursing home
- copies of all saving bonds and the cash surrender values of these accounts for the current month and also for the date of admission to a hospital/nursing home
- verification of all divestments (gifts) that have been made in the last five years (copies of checks or bank statements)

INCOME RECORDS

- evidence of Social Security or Supplemental Security income (copy of the Social Security benefits letter which is sent every December)
- evidence of pension from former employers

HOUSEHOLD EXPENSES

- copy of current mortgage statement showing payoff and monthly payment
- copy of rent or lot statement
- homeowners insurance statement
- current bills or receipts for gas and electric
- health or medical insurance premium statements