

Jordan Balkema Elder Law Center, PLLC

MEDICAID QUALIFICATION CHECKLIST - MARRIED PERSON

**PLEASE PROVIDE WRITTEN VERIFICATION
OF ANY OF THE FOLLOWING ITEMS THAT APPLY
TO YOU AND TO YOUR SPOUSE**

Drivers License	_____		
Birth Certificate	_____		
Medicare Card	_____		
Health Insurance Card (front and back)	_____		
Bill for Health Insurance	_____		
Social Security Card	_____		
Trust Agreements	_____		
Power of Attorney	_____		
Name of Skilled Nursing Center	_____		
Cash in Patient Trust Account	_____		
Checking Account Balances	_____	_____	_____
Savings Account Balances	_____	_____	_____
Certificates of Deposit	_____	_____	_____
IRA/401K	_____	_____	_____
Stock Certificates	_____		
US Bonds	_____		
Brokerage Accounts	_____	_____	_____
Annuity Contracts	_____	_____	_____
Business Interest	_____	_____	_____

Real Estate – Residence _____
(deed, tax notice, mortgage, land contract, rental agreements etc)

Real Estate – Other _____
(deed, tax notice, mortgage, land contract, rental agreements, etc.)

Utility Bills _____

Vehicles
(car/truck/boat/atv, etc.) _____

Life Insurance Policies
(face value & cash value) _____

Funeral Plan _____

Burial Plots _____

Income Tax Return _____

Income Information

Social Security _____
Pension _____
Other _____

Are you or your spouse
a Veteran? Yes or No

DD-214 _____

Honorable Discharge _____

Other: _____

Jordan Balkema Elder Law Center

**218 Maple St. Ste. A
Big Rapids MI 49307
231-796-4012**

**1020 Hastings St. Ste. 105
Traverse City MI 49686
231-935-4646**