

THOMPSON, THOMPSON & GLANVILLE, PLC

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LONG-TERM-CARE DOCUMENT LIST

PERSONAL RECORDS

- _____ Social Security card (copy front and back) (*both spouses*)
- _____ driver's license or state identification card (copy front and back) (*both spouses*)
- _____ health insurance cards (copy front and back) (*both spouses*)
- _____ Medicare card (copy front & back) (*both spouses*)
- _____ 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 Admission Record 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 last six months 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

_____ health or medical insurance premium statements