



# HASKINS SHORT & BRINDLEY LLC

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## MEDICAL ASSISTANCE PLANNING WHAT TO BRING WITH YOU

<b>PROOF NEEDED</b>	<b>SUGGESTED ITEMS TO GIVE PROOF</b>
Social Security Number (SSN) (also spouse, if married)	Social Security card, Social Security Administration award letter, or receipt for SSN application.
Citizenship, Alien Status, Identity, Age, and Relationship (also spouse, if married)	Birth certificate, adoption papers, hospital or medical records, draft or military card, baptismal certificate, alien registration card, US Immigration Form I-94, passport, school records, court records, marriage certificate, divorce or separation paper, or death certificate.
Disability and Blindness, or Incapacitation	Award letter from Social Security Administration or doctor's statement.
Checking Accounts	Checkbook or current credit union or bank statements.
Savings Accounts	Passbook or current credit union or bank statements.
Certificates of Deposit, Retirement Accounts (including IRA and Keogh accounts), Stocks or Bonds (including U.S. Savings Bonds) and other Savings or Investments	Statements from stockholder, copy of bonds, or current bank, credit union or savings and loan statements.
Trust Funds	Trust agreement or court order.
Burial Assets	Burial trust agreement, contract or deed for vault, casket or place, and statement showing current value.
Vehicles (cars, trucks, boats, campers, snowmobiles, and other motorized vehicles)	Car title and registration, written statement from car dealer, loan papers or sales receipt, or State Division of Motor Vehicle statement.

Care Facility Expenses	Current billing showing care facility monthly charges or statement from care facility showing charges.
Child Support Received or Paid	Court order or payment record.
Child Care Expenses	Signed statement from the child care provider or receipts and bills.
Health Insurance (other than Medicaid)	Medicare card, health insurance ID card, and health insurance premium statement.
Durable Power of Attorney	Signed document with all responsibility changes and amendments, if applicable.
Health Care Power of Attorney	Signed document with all responsibility changes and activation form, if applicable.
Will	Signed document and codicils, if applicable.
Pregnancy	Statement from doctor with estimated due date.
Unemployed Parents	Earnings statement signed by employer, income tax statements, Job Service statement, or payroll check stubs for the last three years.
School Enrollment or other Status	Letter from school, report card, diploma, GED certificate, or high school equivalency diploma.

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