

# LONG TERM CARE PLANNING

Audra B. Woods- Elder Care and Accredited Veteran's Attorney

## ASSET PROTECTION CHECKLIST

**The following items for EACH member of the family unit are needed to do a proper and complete analysis:**

- Drivers License-or State ID       Social Security Card
- Medicare Card
- Health Insurance Card and monthly billing statement
- Nursing Home Security Deposit Amount-if any and do not pay one until you consult with the attorney
- Social Security Benefits Letter not 1099
  - \* Please Dial 800-772-1213 (1) (3) (6)
- Pension Statement- for each pension there is
- Tax Bill For any Real Property (Home, Cottage, Vacant Land)
- Life Insurance Contracts and Cash Value Statements
- Deeds for all properties and any properties deeded or sold within the past 5 years
- Title to Vehicles / Boats       Prepaid Funeral Contracts
- Power Of Attorney       Trust Agreement/Last Will
- Copies of Household bills if married couple:
  - \* Gas      \* Trash/water/sewer
  - \* Electric      \* Homeowner Insurance
- Most Current Financial Statements including but not limited to the following:
  - \* Bank statements      \* Annuity
  - \* Stocks/Bonds      \* CD's
  - \* Mutual Funds      \* Portfolio accounts
- Any legal documents or medical documents you may have recently received, including Long Term Care Insurance

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