



**ITEMS TO BRING WITH YOU TO THE INITIAL CONSULTATION
 AND/OR RETAINER APPOINTMENT**

Please provide the information listed for the person in need of long term care, and, if married, his/her spouse. Please provide by due date: _____

<input type="checkbox"/>	Birth Certificate (s)	<input type="checkbox"/>	Social Security Award Letter (s)
<input type="checkbox"/>	Government Picture Id (s)	<input type="checkbox"/>	Annual Veterans Pension statement
<input type="checkbox"/>	Social Security Card (s)	<input type="checkbox"/>	Most recent monthly Retirement Pension Stub (s)
<input type="checkbox"/>	Medicare Card (s)	<input type="checkbox"/>	Most recent annuity statement (s)
<input type="checkbox"/>	Other Health Insurance Card (s)	<input type="checkbox"/>	Interest / Royalty / Dividend statements
<input type="checkbox"/>	Marriage Certificate	<input type="checkbox"/>	Most recent RENT receipt and / or MORTGAGE billing statement
<input type="checkbox"/>	Names, Addresses & Phone Numbers to Health Care Facilities person has resided in within the past year	<input type="checkbox"/>	Most recent Home Property tax bill
<input type="checkbox"/>	Last five (5) years federal tax returns	<input type="checkbox"/>	Most recent Homeowner's Insurance bill
<input type="checkbox"/>	ALL PAGES of the last three (3) months statements for all accounts held at financial institutions (BANKS, CREDIT UNIONS, INVESTMENT & BROKERAGE HOUSES) <i>"ACCOUNTS" may include, but are not limited to checking, savings, certificates of deposits (CDs), mutual funds, investments, IRAs, Keough funds, stocks, bonds</i>	<input type="checkbox"/>	Most recent Utility bill
<input type="checkbox"/>	Stock certificates and / or US savings bonds and / or other bonds	<input type="checkbox"/>	Most recent Homeowner's Associates dues statement
<input type="checkbox"/>	If you have sold or given away any property or vehicles OR have closed any financial accounts or cashed in any other types of assets within the past five (5) years , please provide copies of the documents reflecting the sale or closure or transfer of ownership (final account statements, settlement documents, bills of sale, etc.)	<input type="checkbox"/>	Medical Records (most recent History and Physical, MRIs, CT scans, hospital and / or nursing home discharge summaries, medical diagnoses)
<input type="checkbox"/>	If you have sold any property to another person on payments, please bring all paperwork relating to the sale and the note	<input type="checkbox"/>	LEGAL DOCUMENTS <input type="checkbox"/> TRUST & Schedules <input type="checkbox"/> LAST WILL <input type="checkbox"/> POA(s)
<input type="checkbox"/>	ALL life insurance policies and annuity policies. If available, the most recent annual policy statement which verifies the most recent policy value (aka: cash surrender value statement)	<input type="checkbox"/>	<input type="checkbox"/> HEALTH CARE POA(s) <input type="checkbox"/> LIVING WILL(s)
<input type="checkbox"/>	ALL pre-need burial or cremation plans. If funded with life insurance, a copy of the policy that funds the plan and the assignment form	<input type="checkbox"/>	ALL vehicle titles "VEHICLE" may include, but is not limited to, cars, trucks, vans, motorcycles, trailers, mobile homes, RVs, golf carts, ATVs or watercraft
		<input type="checkbox"/>	DD214 and/or Other Military Discharge Papers