

# The Law Office Of Judy S. Mock, P.C.

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## ***Initial Consultation Checklist for Medicaid Planning***

**The following documentation will be necessary for your Initial Meeting.**  
**(下列文件将需要为您的首次会议)**

### ***Photo Identification (照片身分證)***

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Driver's License or Passport (駕駛執照或護照)

Immigration Status 移民身份 (綠卡/公民)

Birth Certificate (出生证明)

Social Security Card (社會安全卡)

Social Security Award Letter (please contact SSA at (800) SSA-1213) (退休金收入證明)

Veteran? If yes, please provide proof. (名退伍軍人?) (如果是, 請複印您的卡)

### ***Marital Status (婚姻狀況) / Familial Information (家庭)***

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Photo Identification and Social Security Card for Spouse (配偶 照片身分證) (配偶社會安全卡)

Marriage certificate (結婚證書)

Disabled Spouse (如果你有一個殘疾 配偶, 請提供殘疾證明和照片身份證明)

Death Certificate of Spouse (配偶死亡证明书)

Previously Married? (以前结婚) Divorce decree (如果是, 离婚判决, 配偶死亡证明书)

Disabled Child (如果你有一個殘疾兒童, 請提供殘疾證明和照片身份證明)

Information for any Sibling residing with Client (與你同住的兄弟姐妹資料)

### ***Health Insurance Information (保險資料)***

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Health insurance Card (醫療保險)

Medicare Card and Proof of Enrollment in Part A and/or Part B (醫療保險卡)

Supplemental Insurance Card and Policy (補充保險) (複印正反面)

Long-Term Care Insurance Card and Policy (長期護理保險)

## **Financial Information (財務資料)**

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Have you or your spouse made any transfers or gifts during the past FIVE years? List All.  
(你或你的配偶在過去五年有沒有任何轉讓或禮物贈送給他人?) (如果是, 列出所有)

Copy of Deed(s) (任何不動產契約由申請人或配偶擁有)

Copy of any and all mortgage Invoices (按揭發票)

Bank Statements – 4 months (支票賬戶/儲蓄戶口/證券4個月報表)

Investment Accts: (Stocks, Bonds, Mutual Funds, CDs, and etc.) (投資賬戶: 股票, 債券, 共同基金, 定期和等)

Business ownerships by MA and Spouse (由申請人或配偶擁有商業文件, 合夥協議或其他所有企業)

Motor Vehicle Title(s) (機動車由申請人或配偶擁有)

Life insurance and Annuity Policies including values (終身壽險, 人壽保險及年金政策, 包括價值)

Tax Returns for past 3 years (報稅表3年)

## **Monthly Income (每月總收入)**

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If employed, pay stubs for the past 4 month (如果在職, 過去4個月工資單)

Social Security Award Letter (退休金收入證明)

Income Verification (Pension, Other Sources) (公司年金或其他收入來源證明公司年金或其他收入來源證明)

IRAs, Annuities (年金)

## **Monthly Expenses (每月開支)**

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Mortgage Invoices (按揭發票)

Rent receipts (租金收據)

Utility Bills (Con-Edison, Telephone, Gas, Electric) (水電費: CON-愛迪生, 電話, 煤氣, 電)

## **Miscellaneous Information (杂项信息)**

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Nursing Home/Social Worker (療養院) (社工姓名/聯繫電話)

Trust Agreements (信託協議)

Funeral/Burial Agreements (葬禮協議)

Power of Attorney (授權書)

Health Care Proxy and Other Advanced Directives (醫療護理委託書及其他指令)

Have you ever applied for the Medicaid benefits? If yes, when? 有否申請過醫療補助福利？如果是的話，什麼時候