

DOCUMENTS REQUIRED FOR MO HEALTHNET PLANNING

Please disregard any items you may have already provided at your initial consultation or that is not applicable

Medical Information

1. Copy of Health Insurance Premiums
2. Medicare cards and any additional health insurance card(s)
3. Current health insurance premium verification (i.e. a billing statement)
4. Verification of the first 30 days of institutionalization (defined as the first 30 continuous days in a hospital and/or vendor certified bed in a nursing facility)

Personal Information

1. Marriage Certificate
2. Divorce Decree(s)
3. Death Certificate(s)
4. Birth Certificate(s)

Financial Information

1. Verification of all gross income (including Social Security (i.e. Social Security Award letter), Pensions, interest and dividends)
2. Copies of bank statements for the last three months, including copies of cancelled checks
3. Verification of the values of all CD's, stocks, bonds, and other investments (in previous three months)
4. All life insurance policy verification with verification of the current cash surrender value(s) (Please note: the face value does not correspond with the cash value on whole life insurance policies. Please send a copy of all life insurance policies and request a verification from the insurance company confirming the current cash value)
5. Complete copies of all annuity contracts (entire contract)
6. Real estate deeds and verification of the mortgage balance owed, if any
7. Verification of current real estate tax and homeowner's insurance premium
8. Verification of condominium maintenance fees, if applicable
9. Copies of utility bills (water, gas, electric, etc.) with the address
10. Verification of all transfers of property over the last 3-5 years
11. Certificates of title for personal property (i.e., automobiles, tractors, ATV's, etc.)
12. Copies of prepaid burial plans with verification of their irrevocability