THE ELDER LAW FIRM Davis Pagnano McNeil & Vigna, LLP

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INFORMATION TO BRING TO THE HEALTH CARE COST MEETING

Please bring photocopies or originals of the following documents with you to your appointment. Most people do not have all of the documents listed below. Please bring the ones that you have.

- ☐ Social Security, Railroad Retirement, and VA notices showing current amount of benefits and deductions
- ☐ Pension plan payment notices or stubs showing current amount of benefits and any deductions
- ☐ Contracts or statements showing other types of current income, for example, annuity payments, payments from selling a piece of property on a contract, or payments on a loan
- ☐ Deed for the home and other real property, with most recent property tax statements and property insurance statements
- ☐ Rental agreements
- ☐ Titles or registrations for cars, trucks, recreational vehicles, and boats
- ☐ Most recent statements for checking, savings, and money market accounts; certificates of deposit (CDs); mutual funds and brokerage accounts; Treasury Direct accounts; and IRA, Keogh, 401K, and other retirement plans or accounts (including beneficiary designations)
- ☐ Life insurance policies and annuity contracts (including beneficiary designations)
- ☐ Contracts or information about any prepaid funeral plans or burial insurance policies
- ☐ Documents or printouts showing the ownership and value of other assets (for example, digital assets, stock certificates, U.S. savings bonds, mineral rights, and business interests)
- ☐ Health insurance premium notice and any unpaid bills for medical expenses
- ☐ Most recent statements showing balances owing and required payments on mortgages, trust deeds, loans, credit cards, and debts
- ☐ Medicaid application
- ☐ Financial power of attorney, advance directive for health care, or Letters of Guardianship or Conservatorship

If married, bring all of the above documents for both spouses, plus pay stubs or other documents showing any income from employment and any deductions.