

## Married Couple Checklist of records required by DHS

ALL items below (if they apply) – BOTH HUSBAND & WIFE - are REQUIRED by DHS

- 🏠 Photo ID for both husband and wife (driver's license or state issued ID card).
- 🏠 Birth records (if available) and marriage certificate
- 🏠 Medicare card AND Social Security card for both (if there is no SS card, then the SS 1099 for tax purposes shows their SS number)
- 🏠 Insurance cards (both front and back) for both, from ANY health insurance plan along with 2025 verification premium notices.
- 🏠 Social Security Administration 2025 Benefit Verification Letters for both husband and wife
- 🏠 Pension or other income sources Benefit Verification Letters, stating gross monthly amount for either or both spouses.
- 🏠 Annuity contracts owned by either or both for which either of you may receive payments
- 🏠 Life insurance policies showing current death benefits, cash surrender values and premium amount, for either or both. Proof of any life insurance that was surrendered.
- 🏠 Recent bank statements on ALL accounts & ALL PAGES (checking/savings/money markets/CD's) on which either husband and/or wife's name appears for the 3 months prior to the Medicaid eligibility date. \_\_\_\_\_
- 🏠 Recent statements from either or both brokerage account and/or Computershare or Shareowner online statements and/or bond information.
- 🏠 Closing statements for property sold within the past 2 years
- 🏠 A Kelley Bluebook (KBB) or NADA trade-in value report of each vehicle, mobile homes, boats, trailers, ATV's, campers or RV's, etc. that is registered in either or both names
- 🏠 Preplanning Funeral arrangements and cemetery plot documentation
- 🏠 Mortgage statement and/or promissory notes and/or contracts *for which you receive payment*
- 🏠 Financial Power of Attorney document for the person applying for Medicaid
- 🏠 Current Verification Letters for Long term care insurance benefits for either or both.
- 🏠 Current Invoice/Billing Statement from the Care Center
- 🏠 Military discharge papers-DD214 ( if applicable)
- 🏠 Miller Trust (if applicable): Banks new account form & complete Miller Trust document