

**MEDICAID PLANNING QUESTIONNAIRE
(MARRIED)**

Date _____ File No. _____

Home Phone No. _____ Business Phone No. _____

Cell Phone No. _____ Fax No. _____

E-mail Address _____

This form is extremely important. Your accuracy and completeness in responding will help me best represent you. Please bring this information with you to your appointment.

A. CLIENT DATA

(Husband)

Full Name _____
(print name as shown on your checks)

(Wife)

Full Name _____
(print name as shown on your checks)

Street Address _____

City _____ State _____ Zip _____

(Husband)

Birth Date _____

(Wife)

Birth Date _____

Social Security No. _____

Social Security No. _____

U.S. Citizen? Yes No

Veteran? Yes No

U.S. Citizen? Yes No

Veteran? Yes No

If you or your spouse is a Veteran, are you receiving Tricare? Yes No

B. MEDICAL DATA

1. HEALTH

Name of Ill Spouse _____

Diagnosis _____

If Ill Spouse has already entered a nursing home:

Name of Nursing Home _____

Date Entered _____

Name of Well Spouse _____

Where Well Spouse Currently Resides _____

Health of Well Spouse _____

2. PHYSICIANS

Full Name of Husband's Primary Physician _____

Street Address _____

City _____ State _____ Zip _____

Full Name of Wife's Primary Physician _____

Street Address _____

City _____ State _____ Zip _____

C. MONTHLY INCOME

	Husband's Monthly Income	Wife's Monthly Income
Social Security Benefits	\$ _____	\$ _____
Medicare Part B Deduction	\$ _____	\$ _____
Co-pay Medicare Part D	\$ _____	\$ _____
Pension/Retirement Benefits (Gross)	\$ _____	\$ _____
Employment	\$ _____	\$ _____
Veterans Disability Income	\$ _____	\$ _____
Annuity Income	\$ _____	\$ _____
Rental Income	\$ _____	\$ _____
Other _____	\$ _____	\$ _____
TOTAL MONTHLY INCOME	\$ _____	\$ _____

If there is a pension, please list the **gross pension amount**, including any monies taken out for federal income taxes, health insurance, or any other reason.

Do not include interest and dividend income on this form.

D. MONTHLY SHELTER EXPENSES

(Please divide annual expenses by 12 and quarterly expenses by 3)

Rent/Mortgage	\$ _____
Real Estate Taxes	\$ _____
Water	\$ _____
Sewer	\$ _____
Utilities (Heat, Electric & Telephone) (1/12th of last 12 months)	\$ _____
Homeowner's insurance premium	\$ _____
Condominium fees	\$ _____
Total Monthly Housing Expenses	\$ _____

E. MONTHLY NON-SHELTER LIVING EXPENSES

Food	\$ _____
Medical	\$ _____
Clothing	\$ _____
Transportation (including auto insurance)	\$ _____
Home Maintenance	\$ _____
Life Insurance Premiums	\$ _____
Health Insurance Premiums	\$ _____
Cable TV	\$ _____
Federal and State Income Taxes	\$ _____
Other	\$ _____
Total Monthly Non-Shelter Living Expenses	\$ _____

F. GIFTS

Have you made any gifts within the last five years to an individual or to a trust? Yes No

If yes, list below:

Recipient _____ Date _____ Amount _____

Recipient _____ Date _____ Amount _____

Recipient _____ Date _____ Amount _____

Have you ever filed a Federal Gift Tax Return? Yes No

If yes, please state details _____

G. CHILDREN (if applicable, include adult and minor children)

Name of Child 1 _____ Gender: Male Female

Street Address _____

City _____ State _____ Zip _____

Home Phone Number _____ Work Phone Number _____

Date of Birth _____ Social Security Number _____

E-mail Address _____

Relationship to Husband: Natural child Adopted Stepchild Child born out of wedlock

Relationship to Wife: Natural child Adopted Stepchild Child born out of wedlock

Name of Child 2 _____ Gender: Male Female

Street Address _____

City _____ State _____ Zip _____

Home Phone Number _____ Work Phone Number _____

Date of Birth _____ Social Security Number _____

E-mail Address _____

Relationship to Husband: Natural child Adopted Stepchild Child born out of wedlock
Relationship to Wife: Natural child Adopted Stepchild Child born out of wedlock

Name of Child 3 _____ Gender: Male Female

Street Address _____

City _____ State _____ Zip _____

Home Phone Number _____ Work Phone Number _____

Date of Birth _____ Social Security Number _____

E-mail Address _____

Relationship to Husband: Natural child Adopted Stepchild Child born out of wedlock
Relationship to Wife: Natural child Adopted Stepchild Child born out of wedlock

Name of Child 4 _____ Gender: Male Female

Street Address _____

City _____ State _____ Zip _____

Home Phone Number _____ Work Phone Number _____

Date of Birth _____ Social Security Number _____

E-mail Address _____

Relationship to Husband: Natural child Adopted Stepchild Child born out of wedlock
Relationship to Wife: Natural child Adopted Stepchild Child born out of wedlock

Name of Child 5 _____ Gender: Male Female

Street Address _____

City _____ State _____ Zip _____

Home Phone Number _____ Work Phone Number _____

Date of Birth _____ Social Security Number _____

E-mail Address _____

Relationship to Husband: Natural child Adopted Stepchild Child born out of wedlock
Relationship to Wife: Natural child Adopted Stepchild Child born out of wedlock

Are all of your children in good health? Yes No

Are any of your children blind? Yes No

Are any of your children disabled? Yes No

Are any of your children receiving SSI or other form of government entitlement? Yes No

If yes: How much is the child's monthly payment? \$ _____

Is the child receiving Medicaid or Medicare? Medicare Medicaid

Do any of your family members have any problems with:

AIDS? Yes No
Drug Addiction? Yes No
Alcoholism? Yes No
Spendthrift? Yes No

Do any of your children live with you in your home? Yes No

If yes, name of child _____

Are you a contributor to a 529 Plan? Yes No

If yes, please attach a statement of the 529 account.

H. GRANDCHILDREN

Name of Grandchild 1 _____ Gender: Male Female

Relationship to Husband: Natural grandchild Stepgrandchild
Relationship to Wife: Natural grandchild Stepgrandchild

Name of Grandchild 2 _____ Gender: Male Female

Relationship to Husband: Natural grandchild Stepgrandchild
Relationship to Wife: Natural grandchild Stepgrandchild

Name of Grandchild 3 _____ Gender: Male Female

Relationship to Husband: Natural grandchild Stepgrandchild
Relationship to Wife: Natural grandchild Stepgrandchild

Name of Grandchild 4 _____ Gender: Male Female

Relationship to Husband: Natural grandchild Stepgrandchild
Relationship to Wife: Natural grandchild Stepgrandchild

Name of Grandchild 5 _____ Gender: Male Female

Relationship to Husband: Natural grandchild Stepgrandchild
Relationship to Wife: Natural grandchild Stepgrandchild

Are all of your grandchildren in good health? Yes No

Are any of your grandchildren disabled? Yes No

I. CONTACT PERSON

Name _____

Street Address _____

City _____ State _____ Zip _____

Home Phone Number _____ Work Phone Number _____

Cell Number _____ Fax Number _____

E-mail Address _____

L. CERTIFICATION

The undersigned hereby represents to The Grodberg Law Firm and each of its attorneys that the information contained in this intake form is accurate and complete, and that the undersigned understands that the law firm and its individual lawyers will rely on this information. I understand that if the information contained herein is inaccurate or incomplete, the recommendations made by the law firm may not be appropriate.

Signature of Client or Client Representative:

MEDICAID PLANNING -ADDITIONAL INFORMATION

Last Name of Client _____

File No. _____

A. ASSETS/LIABILITIES

ASSETS	HUSBAND	WIFE	JOINT	LIABILITIES
PERSONAL EFFECTS				
AUTOMOBILE				
CHECKING				
SAVINGS				
MONEY MARKET				
CERTIFICATES OF DEPOSIT				
RESIDENCE (ASSESSED VALUE) BLOCK# _____ LOT# _____ EQ. RT _____ REM. FCTR _____				
OTHER REAL ESTATE BLOCK# _____ LOT# _____ EQ. RT _____ REM. FCTR _____				
ADDITIONAL AUTOMOBILES				

ASSETS	HUSBAND	WIFE	JOINT	LIABILITIES
BROKERAGE/CAP ACCOUNTS				
MUTUAL FUNDS				
STOCKS				
BONDS				
ANNUITIES				
CASH VALUE - LIFE INSURANCE				
TRADITIONAL IRA/RETIREMENT PLANS				
ROTH IRA				
NURSING HOME DEPOSIT				
PREPAID FUNERAL/CREMATION				
OTHER:				
OTHER:				
TOTALS				

Residence Information

Purchase Price \$ _____

Purchase Costs
(title & escrow fees, real estate agent
commissions, etc.) + \$ _____

Improvements + \$ _____

Selling Costs
(title & escrow fees, real estate agent commissions, etc.) + \$ _____

Accumulated Depreciation - \$ _____

Cost Basis = \$ _____

Have you owned the property for 2 of the last 5 years? Yes No

Have you occupied the property for 2 of the last 5 years? Yes No

Have you sold property within the last 2 years? Yes No

If yes:

What was the cost basis of the property? \$ _____

What was the sales price? \$ _____

Have you gifted property? Yes No

If yes:

Number of Donees _____

Was it a give from Husband and Wife? Yes No

Amount of Unified Credit Available _____

Other Real Property Information

Address of any real property other than personal residence:

(1) Street _____ City _____ State _____ Zip _____

Tax Block # _____, Lot # _____ (Can be obtained from Tax Bill)

What did you pay for this property including any improvements? \$ _____

(2)Street _____ City _____ State _____ Zip _____

Tax Block # _____, Lot # _____ (Can be obtained from Tax Bill)

What did you pay for this property including any improvements? \$ _____

Name of Homeowner's Insurance Company _____

Street Address _____

City _____ State _____ Zip _____

Phone No. _____

Policy No. _____

B. MONTHLY COST OF NURSING HOME

Monthly Nursing Home Cost \$ _____

Monthly Prescription Cost \$ _____

Monthly Incontinent Cost \$ _____

Monthly Medical Insurance Cost (Ill Spouse Only) \$ _____

Monthly Other Cost \$ _____

Total Monthly Cost \$ _____

The nursing home is paid through _____ (month/year).

C. LIFE INSURANCE

Name of Insurance Company _____ **Policy #** _____
Street Address _____
City _____ State _____ Zip _____
Type of Policy _____ Owner _____
Insured _____ Beneficiary _____
Death Benefit: \$ _____ Face Value: \$ _____ Cash Value: \$ _____

Name of Insurance Company _____ **Policy #** _____
Street Address _____
City _____ State _____ Zip _____
Type of Policy _____ Owner _____
Insured _____ Beneficiary _____
Death Benefit: \$ _____ Face Value: \$ _____ Cash Value: \$ _____

Name of Insurance Company _____ **Policy #** _____
Street Address _____
City _____ State _____ Zip _____
Type of Policy _____ Owner _____
Insured _____ Beneficiary _____
Death Benefit: \$ _____ Face Value: \$ _____ Cash Value: \$ _____

Name of Insurance Company _____ **Policy #** _____
Street Address _____
City _____ State _____ Zip _____
Type of Policy _____ Owner _____
Insured _____ Beneficiary _____
Death Benefit: \$ _____ Face Value: \$ _____ Cash Value: \$ _____