

EXHIBIT "A"
MEDICAID PLANNING-PERSONAL INJURY SETTLEMENT (ADULT)

PLEASE BRING THE FOLLOWING DOCUMENTS TO YOUR APPOINTMENT AND WE WILL COPY THEM:

BACKGROUND AND HEALTH INFORMATION:

1. Social Security card for applicant (and spouse, if applicable).
2. Drivers license or some other photo identification for applicant (and spouse, if applicable).
3. Birth certificate or other proof of citizenship (if none, then voter's registration card) for applicant (and spouse, if applicable).
4. Medicare card and written proof of monthly payment for applicant (and spouse, if applicable).
5. Supplemental Health Insurance Policy and card for applicant. Need to know address and written proof of monthly premium also.

GOVERNMENT BENEFITS: NOTE - IF YOU HAVE MINOR CHILDREN OR, A SPOUSE AND THEY WILL RECEIVE A PORTION OF THE SETTLEMENT PROCEEDS YOU MUST PROVIDE THE FOLLOWING DOCUMENTATION FOR THEM ALSO.

6. Letter from Social Security stating gross monthly social security benefits (retirement; SSI; SSDI) and the date the benefits began for applicant (and spouse, if applicable). You can obtain this information by calling social security at (800) 772-1213 and requesting same be mailed to you at home or, you can go to a local office and it will be printed while you are there.
7. Letter from the Department of Children & Families (DCF) stating the type of public assistance you are currently receiving (Medicaid; Food Stamps). Medicaid card if you are currently a recipient of Medicaid benefits.
8. Written proof that you have been determined to be disabled by the Social Security Administration.

LEGAL INFORMATION RELATING TO THE SETTLEMENT:

9. Letters of Guardianship. Name, address, telephone number of the guardian's attorney.
10. Proposed Closing Statement (or settlement offer) for personal injury settlement.
11. Structured settlement proposal.
12. Care Plan addressing the plaintiff's medical, social, psychological and therapeutic needs.

ASSET & INCOME DOCUMENTATION:

13. Deed and tax bill for home and any other property owned.
14. Copies of last six months bank statements for all bank accounts, IRA's and Certificate of Deposit for

- applicant (and spouse, if applicable).
15. All Life Insurance policies for applicant (and spouse if applicable).
 16. Car title, vehicle registration and insurance policy for applicant (and spouse if applicable).
 17. Copies of last six stock statements from brokerage house or copy of stock certificates for applicant (and spouse if applicable).
 18. Copy of irrevocable burial contract with funeral home if you have one, or other burial contract if you have one for applicant (and spouse if applicable).
 19. If there is a pension, please call the Company to send written documentation as to the gross amount of the pension for the applicant (and spouse if applicable).
 20. Copy of current Last Will & Testament, Trust, Power of Attorney, Living Will, Designation of Health Care Surrogate.
 21. Any other documentation evidencing any asset owned by applicant (or spouse, if applicable).

(Revised 7/1/05)

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