

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

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

BACKGROUND AND HEALTH INFORMATION:

1. Social Security card for child.
2. Photo identification for child. (Driver's license for parents)
3. Birth certificate or other proof of citizenship (if none, then voter's registration card) for child.

GOVERNMENT BENEFITS: NOTE - IF THE PARENTS WILL RECEIVE A PORTION OF THE SETTLEMENT PROCEEDS YOU MUST PROVIDE THE FOLLOWING DOCUMENTATION FOR THEM ALSO.

4. Letter from Social Security stating gross monthly social security benefits (retirement; SSI; SSDI) and the date the benefits began for child. 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.
5. Letter from the Department of Children & Families (DCF) stating the type of public assistance the child is currently receiving (Medicaid; Food Stamps). Medicaid card if you are currently a recipient of Medicaid benefits.
6. Written proof that the child has been determined to be disabled by the Social Security Administration.

LEGAL INFORMATION RELATING TO THE SETTLEMENT:

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

ASSET & INCOME DOCUMENTATION: (PERTAINING TO THE PARENTS IF THEY WILL RECEIVE DERIVATIVE PROCEEDS)

11. Deed and tax bill for home and any other property owned.
12. Copies of last six months bank statements for all bank accounts, IRA's and Certificate of Deposit
13. All Life Insurance policies.
14. Car title, vehicle registration and insurance policy.

15. Copies of last six stock statements from brokerage house or copy of stock certificates.
16. Copy of irrevocable burial contract with funeral home if you have one, or other burial contract.
17. If there is a pension, please call the Company to send written documentation as to the gross amount of the pension.
18. Copy of current Last Will & Testament, Trust, Power of Attorney, Living Will, Designation of Health Care Surrogate.
19. Any other documentation evidencing any asset owned.

(Revised 7/1/05)

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