

# Items to Bring with You or To Have Knowledge About For the Initial Consultation Appointment

The initial consultation is an opportunity for you to provide us with enough information so that we can evaluate your loved one's potential eligibility for ALTCS or Veterans Benefits, to determine if your loved one may need legal documents completed or updated, and to assess if there are options for using financial planning and tools to accomplish the long term care planning goal.

You do not have to bring any documents with you to the appointment; however, having the following information with you OR accessible to you may help streamline the appointment saving you time and money. We look forward to meeting with you.

1.	<b>Demographic information</b> (name, date of birth, place of birth, marital status, living arrangement (facility name, address, county), phone numbers)
2.	<b>Past five years' living arrangements</b> of person needing long term care
3.	<b>Information about legal documents</b> (POA – power of attorney, medical POA, mental health care POA, living will, trusts (owner or beneficiary), Wills, etc.)
4.	<b>Assets</b> (type of asset, value of assets, debt on assets) (example: financial accounts, investments, retirement accounts, annuities, life insurance, burial insurance, burial plans, businesses, property, vehicles, etc.)
5.	<b>Transfers</b> (information about assets or income that was traded, transferred, or gifted in the past five years)
6.	<b>Income</b> (type of income, amount received, how often received) (example: Social Security, government pensions, retirement pensions, annuities, rental income, earned income, etc.)
7.	<b>Military service</b> (dates of service, whether service was during wartime, honorable discharge)
8.	<b>Potential benefits</b> (type of work person needing care did for a living)
9.	<b>Expenses</b> (types, amounts paid, frequency of payments) (example: rent, utilities, debt, donations, medical expenses, etc.)
10.	<b>Medical insurance coverage</b> (carrier, premium amount, premium frequency)
11.	<b>Family data</b> (names of children and whether disabled or blind or seriously mentally ill)
12.	<b>Medical conditions</b> and information about need for long term care

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Legal Documents

Medicare Insurance



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