

Documents & Information Necessary to Complete an Application for Health Insurance

HEALTH INSURANCE

Copies of all current health insurance coverage (e.g. prescription, secondary) and premium bills.

INCOME

Proof of all current income from all sources before deductions (e.g. income tax filings for the past two years; annuities; trust income, pensions, rental income, taxable Veteran's Benefits, unemployment).

ASSETS

Proof of all assets as detailed below:

Vehicles / Mobile Homes / Boats

A copy of the registration for each vehicle, and proof of the outstanding loan balance. For mobile homes, a copy of the bill of sale. If you have a spouse in a nursing facility, proof of the fair-market value of each vehicle as of the date of admission to the medical institution.

Bank Accounts (Savings, Checking, Money Market, Certificate of Deposits, personal needs allowance, or IRAs)

A copy of your passbooks updated within 45 days and/or a copy of your current account statements.

Life Insurance Policies

A copy of the first page of all life-insurance policies. If the total face value of all policies exceeds \$1,500 per person, a letter from the insurance company showing the current cash-surrender value (for all policies except term policies) will be required.

Stocks, Bonds, Savings Bonds, Mutual Funds, Securities

Proof of current value.

Prepaid burial plans, trusts, plots, burial only accounts

A copy of the trust contract, trust instrument, insurance policy, or burial-only account.

Trusts

A copy of the trust document(s), any amendments, documents showing financial activity, and the schedule of beneficiaries.

Real Estate

A copy of the deed(s), current tax bill(s), and proof of amount owed on all property owned.

Annuities

A copy of the contract. For each annuity owned, proof from the annuity company of the full value of the annuity less any penalties and fees if it can be cashed in.

Deposit to Assisted Living Facility, Continuing Care Retirement Community, or Life-Care Community

A copy of the contract signed with the facility and any documents about this deposit.