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**DOCUMENTS TO BRING TO HEALTH CARE COST CONSULTATION**  
**(Attorney will review with client at meeting)**

Medical Reports or Assessment Levels for Ill Person

Power of Attorney/Guardian/Conservator papers

Will & trust for ill person and for spouse (copies)

Health Care Advance Directive, Health Care Power of Attorney or Living Will

List of Assets Owned by Ill Person and Spouse

Bank, insurance product and brokerage statements (copies of stock or bond certificates, US savings bonds if owned outside of brokerage account; **beneficiary designations**)

Written evidence of actual pension income and social security (i.e copies of monthly checks, bank statements if direct deposited); Social Security Award statement (**critical for Social Security Disability (SSD) or Supplemental Security Income (SSI) cases**)

Nursing home or facility contract

Long term care insurance policy

Health Insurance Proof - Medicaid or Oregon Health Plan card/document, Medicare cards & policy (pamphlet, enrollment materials, retiree plan materials, etc.)

Titles of automobiles, RV, boats or other vehicles

US Savings bonds (Copies)

Life insurance policy, Annuity Contracts, cash value statement and **beneficiary designations**

Life estate, life leases or trust fund documents to show assets, form of title, etc.

Real estate (residence, lots, rentals, etc.) deeds and property tax statements from county

Burial Insurance Policy/Burial Trust documents/Cemetery Plot Deeds