

Medicaid Planning & Applications

CLIENT INTAKE & MEETING PREPARATION

01 Applicant, contact and care needs

Complete after our office requests intake and confirms the conflict-screening step. Unknown / N/A is OK.
Do not enter full SSNs, account numbers, passwords or payment-card details. Keep completed copies private.
Download and save locally before typing. No information is sent to our office by filling in this PDF.

Person seeking Medicaid: full legal name; age; home county/state

Contact person: name, relationship, safe phone/email and authority to assist

State involved: New Jersey / New York / other; recent or planned moves

Current care setting, facility/provider and assistance needed

Care start date, expected transition/discharge date, unpaid care bills or urgent concern

Spouse/partner and household; dependents or family circumstances to discuss

Your questions and goals for the meeting

Ask our office for a verified secure return method, or bring a printed copy to your meeting.
Do not return sensitive completed forms through the website contact form or ordinary email.
Not a court/agency application or legal advice. Completing this form does not establish representation.

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02 Financial information

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Monthly gross income by source for applicant and spouse separately; benefits deductions if known

Bank / investment / retirement / cash accounts: type, owner(s) and approximate balance

Home and other real estate: location, owner(s), value, mortgage and who lives there

Life insurance / annuities / trusts / business interests / other property: values and relevant dates

Gifts, transfers, sales or ownership changes: dates, values, recipients and available records

Debts, care expenses, long-term-care insurance and other benefits

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03 Application status and records

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Status: planning only / not filed / pending / approved / denied / renewal / termination notice

Prior/current application: state, agency/county, filing date, contact and case reference if known

Requests for information, decisions, hearings or notices: dates received and printed deadlines

Documents sent, missing records, delivery receipts and follow-up already made

Power of attorney / guardianship / trusts; lawyer or representative involved

Records available: statements, income letters, deeds, insurance, care and agency documents

Additional facts and questions; attach separate private sheets only when needed

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