



The Law Offices of
Carol Bertsch, PC

Assisting Seniors, Helping Families

LONG TERM CARE QUESTIONNAIRE



For Our information:

Do you want to sign up for our e-newsletter?
_____ yes _____ no

How did you get our name? _____

Name of Contact: _____

Address: _____

City, State, Zip: _____

Phone No.: _____

Email Address: _____

Long Term Care

We take a look at a client's assets and make a plan detailing the best way to protect them and still be able to qualify for Medicaid.

There are some instances where gifting or transfers are possible, but not every instance.

A long-term care consultation is especially necessary when one spouse is going to a Nursing Home and the other isn't.

Our goal is to help you save as much of your nest egg as possible.

The consultation is tailored specifically for the client and covers continued legal counsel for 6 months.

Name of Applicant_____

Name of Facility:_____

Address:_____

City, State, Zip:_____

Social Security No._____

Date of Birth:_____

Name of Applicant Spouse:_____

Name of Facility:_____

Address:_____

City, State, Zip:_____

Social Security No._____

Date of Birth:_____



PLEASE PROVIDE A COPY OF ALL LEGAL
DOCUMENTS, POWERS OF ATTORNEY,
WILLS, TRUSTS, ETC.

What we need to know:

Retirement Income SS/Pension/VA/SSI	Monthly Amount
Spouse 1	
Spouse 2	
Real Estate Address	Value



WHEN APPLYING FOR MEDICAID, BE SURE TO REMEMBER THAT
YOU WILL STILL HAVE AN OBLIGATION TO PAY SOMETHING TO
THE NURSING HOME

CAROL CAN HELP YOU FIGURE OUT WHAT THAT AMOUNT MAY BE

Bank Accounts/Bank	Checking/Savings	Balances

IRA's	Type	Balances

Investments	Type	Balances

Annuities	Type	Balances

Mineral Rights	Location	Value

Vehicles Make/Model/Year	Value

Life Insurance Policies	Cash Value	Face Value	Term?

Burial/Funeral Policies	Provider	Face value

When you are ready to apply Medicaid will want to know the following information as well as any bank accounts that have been closed in the last 5 years.

Gifts Made in the Last 5 Yrs.	To Whom	How Much