



Essential Paperwork for the
Long-term Care Application Process
by the
Admissions Department
Gurwin Jewish Nursing & Rehabilitation Center

For Long-term Care Placement

Below is a list of the vital paperwork every family should have in order to best handle a loved one's long-term needs and wishes.

- SOCIAL SECURITY CARD**
- MEDICARE CARD**
Red, white and blue card showing date of eligibility
- HEALTH INSURANCE POLICIES**
Copy of insurance policy and benefit card. Also required is a copy of the most recent premium notice.
- PROOF OF BIRTH/CITIZENSHIP**
*- If born in the U.S. — Birth Certificate or U.S. Passport
- If born outside the U.S. — naturalization papers, U.S. Passport*
- STOCKS/BONDS/PENSION PLANS**
Copies of brokerage statements for transactions/activity over the past five years. Copies of stock certificates, etc., where available.
- BANKING RECORDS**
*Copies of all banking statements for all accounts held over the past five years, whether the account is currently open or has been closed during this time. Include copies of checks and detail any transaction over \$1000 (deposits or withdrawals).
Copies of all savings account activities.*
- TRUST AGREEMENTS**
Copies of any trust agreement involving the applicant or spouse over the past five years, or any still in effect.
- POWER OF ATTORNEY**
Copies of any power of attorneys given by applicant.
- INCOME TAX RETURNS**
Complete copies of income tax returns filed for the past five years (Federal and State)
- PACEMAKER INFORMATION**
- PROOF OF RESIDENCY**
Need proof of patient's residency prior to institutionalization. Rent receipts or lease/gas or electric bills/phone bills or deed to home.
- DEED TO ANY REAL ESTATE HOLDINGS**
Copies of deeds to any real estate owned over the last five years. If sale took place within that time, copies of appraisals and closing statements. If transfer of ownership, copy of transaction deeds.
- SOCIAL SECURITY/DISABILITY/VETERANS BENEFITS/PENSION**
Copy of most recently social security, disability, VA benefit and/or pension check(s). If direct deposit, include a copy of bank statement or award letters. Copy of Social Security award letter.
- PRE-PAID BURIAL ARRANGEMENTS/DEEDS TO BURIAL PLOTS**
Copies of any pre-paid burial arrangements with funeral homes. Copies of any deeds to pre-paid burial plots.
- LIFE INSURANCE POLICIES**
Copy of insurance policies AND letter stating cash value and face value of policy. If policies have been cashed in during the last five years, verification of amounts received and dates cashed.
- MARRIAGE CERTIFICATE (if applicable)**
- DEATH CERTIFICATE OF SPOUSE (if applicable)**
- SPOUSE IN COMMUNITY**
Copies of all banking records, IRAs, and monthly income checks received by spouse.
- VETERAN BENEFITS**
If applicant or spouse was ever in any branch of the armed services, need copies of discharge papers or correspondence showing armed forces serial number.
- LIVING WILL AND/OR HEALTH CARE PROXY FORM**
- IF TREATED IN LAST YEAR BY ANY DOCTORS, A LIST OF NAMES AND PHONE NUMBERS.**