



TALIS LAW PLLC

11911 NE 1st St., Suite 102
Bellevue, WA 98005
Phone (425) 943-9968
Fax (425) 777-2097
TALISLAWFIRM.COM

CLIENT MEDICAID INFORMATION WORKSHEET

A. PERSONAL

1. Full Name _____
2. Addresses _____

Telephone _____
3. Email _____
4. Birthdate _____

B. INCOME (Pension, Social Security, SSI, wages, etc.)

Description	Monthly amount
_____	_____
_____	_____
_____	_____
_____	_____

C. VALUE OF ASSETS

1. Home
 - a. Market value _____
 - b. Mortgage _____
 - c. Line of credit _____
 - d. Reverse mortgage _____

2. Vehicles

Make, model, year	Loan amount	Blue book value
_____	_____	_____
_____	_____	_____
_____	_____	_____

3. Life Insurance

Type (whole life, term, etc.)	Face value	Cash value (if any)
_____	_____	_____
_____	_____	_____
_____	_____	_____

4. Bank Accounts (checking, savings, CD, etc.)

Type of account	Balance	Name of bank
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

5. Retirement Accounts (IRA, Roth IRA, 401(k), etc.)

Type	Name on account	Balance
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

6. Prepaid Burial Plan

Funeral home or organization	Value
_____	_____
_____	_____

7. Other Investment Accounts (stock accounts, annuities, money market, etc.)

Type	Company	Balance
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

8. Other Real Estate

Description	Market Value	Mortgage, etc.
_____	_____	_____
_____	_____	_____
_____	_____	_____

9. Assets Relating to Operating a Business (equipment, tools, etc.)

Description	Market Value
_____	_____
_____	_____
_____	_____
_____	_____

10. Other Assets

Description	Market Value
_____	_____
_____	_____
_____	_____

11. Do you own any real or personal property as joint tenants with any third parties?

If yes, please describe _____

D. MEDICAL EXPENSE

1. Non-Medicare (not Medicaid) Health insurance Expenses

Description	Cost per month
_____	_____
_____	_____
_____	_____

2. Outstanding Medical Bills

Description	Amount
_____	_____
_____	_____
_____	_____

E. TRUSTS

3. Does any member of your family receive income from any trust? _____

If yes, who created the trust? _____

4. Have you ever created a trust? _____

If yes, give details. _____

5. Do you expect to be named a beneficiary of a trust? _____

If yes, please describe: _____

F. GIFTS AND TRANSFERS

Have you made any gifts or transferred any assets for less than full market value to someone other than your spouse in the last five years? If yes, please describe the gift or transfer.

If the gift or transfer was to one of the following people, please note that in the description: a disabled or blind child, a child who has lived in your home for two years to care for you, or a child who was under twenty-one at the time of the gift.

Description	Date	Value of gift
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____