

## CONFIDENTIAL MEDICAID PLANNING DATA

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Thank you for your interest in our office and the services that we provide. In preparation for your first meeting with our attorneys, we ask that you review the enclosed information. This information appears in two parts: this, the first part, is yours to keep, and will explain why we are requesting personal information and our privacy policy. The second part requires your input, and should be returned to us as described below. It will provide a foundation for our attorneys' consultation, and become a part of your confidential record.

Please understand that the enclosed questionnaire is designed to provide important information for Medicaid planning purposes and that the firm's ability to advise clients depends on the accuracy and completeness of such information.

### INTRODUCTION

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The enclosed form **MUST** be filled out completely, and returned to our office prior to your scheduled initial meeting appointment. An envelope has been included with this packet for you to return the completed form. We need to have approximate values of your assets, as well as the exact way they are owned (individually, jointly, in a trust, etc.).

We cannot analyze your needs and make appropriate recommendations without a complete, honest, and accurate picture of your current and projected financial situation. That includes asset values, how your assets are titled (or, for beneficiary-designated assets, the identity of beneficiaries), liabilities and their amounts, and your general family situation.

**The personal and financial information requested on the following pages is important because it will be used throughout the planning process, and it is therefore imperative that the information provided be complete and accurate.**

At your initial meeting with the attorney, you will be discussing your planning goals and objectives. The attorney will then make some recommendations and talk to you about the Medicaid planning process in more detail.

We look forward to the opportunity to help you with your planning needs.

## PRIVACY POLICY

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Privacy of non-public personal information has become a much discussed topic in the news, especially because of new federal laws that apply to financial institutions. Attorneys have always been and continue to be bound by professional standards of confidentiality that are more restrictive as to the disclosure of confidential client information than those required by new federal privacy laws. Attorneys are bound by their professional rules of ethics to protect clients' right to privacy.

In the course of providing clients with legal services, we may receive non-public personal information from the client or from third parties with the client's authorization. We do not disclose non-public personal information about clients or former clients, except as authorized by the client or as required or permitted under the applicable law and rules of professional ethics.

We retain records relating to the professional services we provide to better assist a client's needs and, in some cases, to comply with professional guidelines. Access to non-public personal information regarding clients is restricted to those persons who must have access to the records to provide the services requested by the client (for example, a tax preparation service). We maintain physical, electronic, and procedural safeguards to protect a client's non-public personal information in accordance with our professional standards.

**HELPFUL DOCUMENTS TO PROVIDE TO ATTORNEY FOR MEDICAID PLANNING**

**CASH ACCOUNTS**

(copies of latest bank statements)  
Checking Accounts  
Savings Accounts  
Certificates of Deposit

**INVESTMENT ACCOUNTS**

(copies of latest account statements)  
Money Market  
Investment Accounts  
Stock Certificates  
Annuities

**RETIREMENT PLANS**

(copies of latest account statements)  
Profit Sharing  
HR 10, IRA, SEP, 401K  
Pension Plans

**INSURANCE POLICIES**

(copies of policies)  
Term, Whole Life  
Universal Life, Group Life  
Disability, Long Term Care  
Auto and Homeowner's

**BUSINESS**

(copies of business documentation)  
Partnership & LLC Interest  
Corporation Interest  
Sole Proprietorship Interest

**REAL ESTATE** - copies of deeds, title work, certificate of title, title insurance, real estate tax bills

**BONDS** - copies of bonds

**COPIES OF POWERS OF ATTORNEY and WILL**

**Do you have automatic deposits or payments from your checking or savings accounts?**

**YES \_\_\_ NO \_\_\_**

**OUR OFFICE WILL BE HAPPY TO MAKE THE COPIES FOR YOU**

*FRISSE & BREWSTER LAW OFFICES IN ILLINOIS AND INDIANA  
PARIS, ILLINOIS 217-465-1234 \*\* TERRE HAUTE, INDIANA 812-234-2777*