



# Pennsylvania Documents Request Checklist

Document checklist for PA MA-LTC review (NH + CHC/HCBS)

## Bring These Documents

- Photo ID + Medicare/insurance cards
- Last 60 months bank statements (all accounts)
- Retirement statements (IRA/401k/403b/457) and distribution terms
- Brokerage/investment statements (stocks/bonds/funds/ETFs)
- Annuity contracts (all) + current statements + payout schedule
- Life insurance statements showing cash value (whole/universal)
- Deeds for all real estate + mortgage/HELOC + property tax bill
- Vehicle titles/registrations (cars, trucks, RV, boats)

## Bring These Documents

- Trust documents + schedules + accountings (if any)
- Award letters (SSA/VA/pensions) + proof of deposits
- Proof/explanations for large deposits/withdrawals
- Records of transfers/gifts/sales within last 60 months (if any)
- Caregiver agreement + payment proof (if applicable)
- Business docs (if applicable): K-1s, ownership %, bank statements
- Funeral/burial contracts and cemetery deeds (if any)
- CHC/managed care notices (if already enrolled)