



MEDICAID COMPLIANT ANNUITY PLANNING INTAKE FORM

MARRIED COUPLE

Information of individual completing this form:

Name:	
Company:	
Address:	
City, State, Zip:	
Telephone:	
Facsimile:	
E-Mail:	

ONCE COMPLETED, RETURN THIS FORM TO:

Krause Financial Services
1234 Enterprise Drive, De Pere, WI 54115
Phone: (866) 605-7437 Facsimile: (866) 605-7438
info@medicaidannuity.com

A. CLIENT DATA

(Husband) (Wife)
Full Name: _____ Full Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

(Husband) (Wife)
Birth Date: _____ Birth Date: _____

U. S. Citizen? Yes No
Veteran? Yes No

U. S. Citizen? Yes No
Veteran? Yes No

B. MEDICAL DATA

Name of Ill Spouse: _____ Diagnosis: _____

Residence of Ill Spouse: Home Nursing Home Assisted Living Facility

If individual has already entered a care facility, please indicate the first date he or she entered on a continuous basis: _____

County the Medicaid applicant will be applying for benefits: _____

Name of Well Spouse: _____

Health of Well Spouse: Poor Fair Good Excellent

Residence of Well Spouse: Home Nursing Home Assisted Living Facility

If he or she is in good health, the Well Spouse may be able to utilize a Long-Term Care Insurance policy as part of his or her estate plan. Is the Well Spouse interested in learning more about the Long-Term Care Insurance options that may be available? Yes No

C. RESPONSIBLE PARTY(IES)

Please provide information regarding the Medicaid applicant's children, Power of Attorneys (POA), beneficiaries, or other responsible party(ies).

NAME	RELATIONSHIP	PHONE NUMBER	STATE OF RESIDENCE

Are any of the individuals named above the primary POA for the Medicaid applicant? Yes No

If yes, please name the individual(s): _____

Are any of the individuals named above interested in learning more about Long-Term Care Insurance in order secure their own financial future? Yes No

If yes, please name the individual(s): _____

If any individuals indicate they are interested in learning more about Long-Term Care Insurance, they may be contacted by a Long-Term Care Insurance Advisor within or associated to our office.

D. MONTHLY INCOME

	Husband's Monthly Income	Wife's Monthly Income
Social Security Benefits	\$ _____	\$ _____
Pension (Gross)	\$ _____	\$ _____
VA Disability Benefit	\$ _____	\$ _____
Other Income*	\$ _____	\$ _____
Total Monthly Income	\$ _____	\$ _____

*If other, please explain: _____

Do not include interest and dividend income on this form. If there is a pension, please list the gross pension amount, including any monies taken out for federal income taxes, health insurance, or any other reason.

E. MONTHLY COST OF CARE

\$ _____	Monthly Facility Cost
\$ _____	Health Insurance Premiums
\$ _____	Medicare Supplemental Insurance Premiums
\$ _____	Monthly Incidental Cost
\$ _____	Monthly Prescription Cost
\$ _____	Monthly Other Cost
\$ _____	Total Monthly Costs

The care facility is paid through _____ (month/year).

F. MONTHLY SHELTER EXPENSES

\$ _____	Rent/Mortgage
\$ _____	Real Estate Taxes
\$ _____	Water/Sewer
\$ _____	Utilities (Heat, Electric)
\$ _____	Homeowner's insurance premium
\$ _____	Other
\$ _____	Total Monthly Housing Expenses

G. ASSETS/LIABILITIES

Total countable resources as of the first continuous period of institutionalization: \$_____

Please insert the **current** value of each asset/liability in the appropriate space. Specify whether multiple accounts or one account for each type of asset.

Asset	Husband	Wife	Joint	Liability
AUTOMOBILE				
ADDITIONAL AUTOMOBILE				
CHECKING ACCOUNT				
SAVINGS ACCOUNT				
OTHER BANK ACCOUNTS				
RESIDENCE				
MUTUAL FUNDS				
STOCKS/BONDS				
ANNUITIES				
RETIREMENT ACCOUNTS				
ROTH IRAs				
OTHER REAL ESTATE				
CARE FACILITY DEPOSIT				
OTHER				
OTHER				
OTHER				
TOTAL				

Does the Ill Spouse own an irrevocable Funeral Expense Trust? Yes No

Does the Well Spouse own an irrevocable Funeral Expense Trust? Yes No

Are there any additional liabilities that should be considered (credit card debt, personal loans, outstanding medical bills, etc.)? Yes No If yes, please explain: _____

H. LIFE INSURANCE

TYPE	DEATH BENEFIT VALUE	FACE VALUE	CASH VALUE	INSURED	OWNER

It is very important to know the cash value and the death benefit of your life insurance policy. To obtain the cash value of the policy, please call your insurance agent, or call the insurance company directly.

I. GIFTS

Has either spouse made gifts in excess of \$100.00 in any one month, to an individual or group of individuals, within the past 60 months? Yes No

If yes, please explain: _____

J. THIRD PARTY COMPENSATION

If there is a licensed insurance agent, financial advisor, or other person seeking compensation on this case, Krause Financial Services must know of their relationship prior to the development of a Medicaid plan. As to commission producing insurance products wherein a planning proposal has been devised, the compensation will be divided 50/50 between the insurance agent and Krause Financial Services. The agent is required to become appointed at the respective insurance company and the commission split must be designated on the insurance product application sent through Krause Financial Services.

Will a third party be seeking compensation in this transaction? Yes No

Has the proposed applicant retained the services of an elder law attorney that will render all legal advice regarding Veterans and/or Medicaid benefits and the ultimate purchase of an insurance product? Yes No

K. CERTIFICATION

The undersigned hereby represents to Krause Financial Services that the information contained in this intake form is accurate and complete, and that the undersigned understands that Krause Financial Services will rely on this information for purposes of developing a Medicaid Annuity plan. The undersigned hereby further understands that if information is omitted from this intake form, whether intentionally or unintentionally, that the information omitted may have a direct, and negative, impact on Medicaid eligibility.

Dated: _____

Signature of Client or Client Representative: _____

By way of this letter, Krause Financial Services, and its agents, are not offering legal advice. The content outlined in this communication may not be suitable for every individual, in every state. As such, before employing or acting upon any one, or more, of the techniques, strategies, or opinions discussed in this letter, the reader should secure the services of a competent elder law attorney in their respective state. Furthermore, no inference is to be drawn that any of the insurance products provided by Krause Financial Services have been reviewed or approved by any state Medicaid office. Krause Financial Services makes no guarantee that the purchase of any insurance products will result in eligibility for Medicaid or any other assistance program.