



CATAWBA COUNTY

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Department of Social Services

RE: Application Information

We will need the following information:

- Verification of Citizenship/Identity (copy will be made of original documents- birth certificate, passport, certificate of naturalization, etc)
- Full name (First, middle, maiden name, and all married names)
- Full names of all former spouses and approximate date of death, separation, or divorce.
 If deceased, what county was spouse a resident of at the time of death?
- Full name (including maiden name) of parents and in-laws. We also need the county of residence prior to their death, or if still living a current address.
- *Copy* of Medicare card and all other health insurance. (Medicare RX card, Medicare Supplements, accident, indemnity, cancer, etc)
- Information regarding Life or burial insurance. *Preferably*, a copy of the policy. If not, name of company, policy number(s) and original face value.
- If a pre-paid burial is in effect, we need a copy of the contract and the statement of goods and services to show it is irrevocable or revocable (available to withdraw value)
- Most recent bank accounts statement (savings, checking CD, IRA, etc---we need the balance as of the base period for prospective application. This is the balance as of the LAST day of the month PRIOR to application month). All statements for retroactive months, and for Long Term Care = up to 60 months of reserve information—from 11/01/2007 to present. Also, we need the account numbers of any other accounts that may have been closed since 11/01/2007 months---and where the money was moved. There may be instances that the worker will require information further back—you will be advised.
- Any cash on hand as of first moment of month assistance requested? If Nursing Home or Assisted Living, does the facility have a patient account for the applicant, and if so, how much as of base period date?
- Any stocks or bonds owned by anybody in the budget unit?
- Any promissory notes held?
- Any real estate owned, co-owned, or inherited? Any real property disposed of in the last 36 months?
- Any vehicles owned? And trailers, Mobile homes, campers, boats, boat motors, trailers, etc?
- Any insurance settlements pending for accidents or lawsuits?
- Any trust funds or annuities?
- What are applicant & spouse's sources of income? (Social Security, pension, retirement, Veterans benefits?)
- Last employer, any pension received (within last 36 months)?
- Was applicant or a former spouse in the military? If so, who, what branch, service dates? Apply for VA.
- Any lump sums of money received since 11/01/2007?
- **HAVE ANY ASSETS BEEN GIVEN AWAY OR SOLD SINCE November 1, 2007 FOR LESS THAN MARKET VALUE?**
- We must have one or two persons listed to act as representatives. Name, address, and phone numbers.

“Keeping the Spirit Alive Since 1842!”

<http://www.co.catawba.nc.us/depts/dhr/dss/dss.htm>