

Government Benefits Checklist

GOVERNMENT BENEFIT CHECKLIST

Client Information

Full Name: _____

Date of Birth: _____

Personal or Familial Disability

Are you disabled?

Yes: Date of Disability _____ No

Is your spouse disabled? (If you are not married, select "No.")

Yes No

Do you have a disabled child? (If you do not have any children, select "No.")

Yes No

Medicare and Medicaid Information

Are you, or anyone in your household, currently receiving Medicare benefits?

Yes No

Are you, or anyone in your household, currently receiving Medicaid benefits?*

Yes No

Are you, or anyone in your household, currently receiving Medicare Savings Program benefits?*

Yes No

Social Security Benefits

Are you, or anyone in your household, currently receiving Social Security Retirement Benefits and/or Social Security Survivor Benefits?

Yes: Monthly Dollar Amount _____ No

Are you currently receiving Supplemental Security Income (SSI) benefits?*

Yes: Monthly Dollar Amount _____ No

Are you currently receiving Social Security Disability Insurance (SSD or SSDI) benefits?

Yes: Monthly Dollar Amount _____ No

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Other Benefits

Are you currently receiving any benefits from the Department of Veterans Affairs?

Yes No

If yes, are you receiving Veterans Pension or Survivor Pension benefits?* (Many people refer to this benefit as Aid and Attendance.)

Yes No

Are you currently receiving Section 8 or Housing and Urban Development (HUD housing) benefits?*

Yes No

Are you currently receiving Supplemental Nutrition Assistance Program (SNAP) or EBT (Food Assistance) benefits?* (Many people refer to this benefit as Food Stamps.)

Yes No

Are you receiving any of the following other government benefits? Select all that apply.

- Children's Health Insurance Program (CHIP)*
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)*
- Low Income Home Energy Assistance Program (LIHEAP)*
- Weatherization Assistance Program (WAP)*
- Temporary Assistance for Needy Families (TANF)*
- Head Start*
- School Breakfast and Lunch Program*
- Special Milk Program*
- Summer Food Service*
- Family Employment Program*
- Other – Please Specify: _____

Date Checklist Completed: _____

*** These benefits are based on assets and/or income and could be jeopardized by the receipt of a personal injury settlement. Careful planning may allow for the preservation of these benefits. Please contact an attorney at Tombs Maxwell LLP to discuss options to preserve these government benefits.**

Tired of Handling Government Benefits Issues on Your Own?

Why retain the liability of giving your clients
government benefits preservation advice?

Watch a 5-minute video showing just how easy it is to
outsource post-settlement government benefits
planning—all at no cost to you or your firm.

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