

VERIFICATION CHECKLIST

BIOGRAPHICAL

- _____ Birth Certificate
- _____ Social Security Card (for both spouses if both spouses are living)
- _____ Health care cards, front and back (both spouses if both are living)
- _____ Private health insurance premium statements
- _____ Marriage Certificate
- _____ Death certificate of spouse if not living
- _____ Naturalization Papers, if applicable
- _____ Military Discharge papers, DD-214

INCOME

- _____ Social Security yearly award letter stating monthly benefit for current year
(you should receive this sometime in December of the prior year)
- _____ Pension statements for the most current month
- _____ IRA statements for current months
- _____ Any other retirement payment statements for most current month
- _____ Annuity policy and statements for most current month
- _____ Any outstanding loans that are being repaid to you

RESOURCES

- _____ All bank account statements for most current 3 months (all pages)
- _____ All investment account statements for most current 3 months
- _____ Real estate deeds (and/or closing papers on real estate sold within 5 years)
- _____ Most recent property tax bill
- _____ All life insurance policies
- _____ Face Value and Cash Surrender Value on all life insurance policies
- _____ Rental agreements for secondary homes
- _____ Automobile registration for all cars
- _____ List of contents in safety deposit box
- _____ Pre-paid funeral and/or burial contracts

MISC.

- _____ Copy of current Will, powers of attorney, and trusts
- _____