

## Platinum's 31 Step Medicaid Application Services Checklist

The steps we use for Guaranteed Application Approval, Asset Protection & Customer Satisfaction

- Initial Meeting**
- Evaluation of Application Approval Likelihood**
- Review Strategies Created By Attorney and Collaborate as Necessary**
- Create a Step by Step Strategy Implementation Plan**
- Verify Assets (writing companies as necessary)**
- Verify Income (writing companies as necessary)**
- Provide Implementation Guidance to Client**
- Setup IRA Distributions (RMD's)**
- Disenrollment From Supplemental Insurance When Appropriate (Medicare Replacement Plans)**
- Nursing Home Notification**
- Estimate Patient Responsibility and Report to the Nursing Home**
- Provide Weekly Update Reports to Nursing Home**
- Communicate with the Attorney as Necessary**
- Provide Copies of Documents to Attorney**
- Communicate with Various Companies to Clarify Instructions As Necessary**
- Negotiate with Banks to Reduce Research and Copy Fees as Necessary**
- Unlimited Phone Calls and Meetings as Deemed Necessary by You**
- Develop and Document the File in Preparation for Medicaid Application**
- Apply to Medicaid**
- Respond to Medicaid Inquiries Timely**
- Pursue the Medicaid Application Through Final Approval**
- Correct Medicaid Calculation Mistakes if Necessary**
- Help in Retitling Assets from NH spouse to CS if Necessary As Instructed by Attorney**
- Requesting and completing Forms for Changing Beneficiaries As Instructed by Attorney**
- Confirming Assets are Structured to Pass by Operation of Law As Instructed by Attorney**
- Reporting Changes to Medicaid as Necessary**
- Making Copies As Necessary for Completeness of Record**
- Mail and FedEx Copies as Necessary**
- Phone Calls to All Parties Necessary for Full Communication**
- Fair Hearing Representation**
- Guaranteed Refund if Platinum Fails to Obtain Benefits Due to Platinum Error (You must do your part)**

