CHECKLIST FOR NEW RESIDENTS

Please use the following checklist as a reminder of the items you will need to provide to United Methodist Communities as part of the admission process. Please bring them to the Sales Director on the day of your interview with the Director of Wellness or before signing your agreement.

Copies of the following:

- Social Security card
- Medicare card
- Other medical insurance card
- Medication insurance card
- Power of Attorney
- Living Will / Advance Directive
- Photo ID (Government Issued)

Copies of the following financial documents: (Not needed for Respite)

- All bank statements
  - Checking
  - Savings
  - Certificates of Deposit
  - Other
- Most recent income tax return
- Most recent Social Security check
  (Usually on bank statement)
- Most recent pension check
  (If applicable, usually on bank statement)
- Most recent copy of any other income
  (If applicable, usually on bank statement)
- Investment statements
- Mortgage statement from lender
- Other liability statements
- Most recent copy of property tax bill
- Copy of pre-paid funeral (Pitman only)
- Approximate total listing of the past year’s medical expenses
  (Pitman only: Dentures, eyeglasses, hearing aids, co-pays, etc.)