

## 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 move-in process. Please bring them to the Marketing and Sales Director on the day of your interview with the Director of Residential Living or before signing your agreement.

### Copies of the following:

- |   |  |
|---|--|
| <input type="checkbox"/> Covid Vaccination Card                           | <input type="checkbox"/> Medication Insurance Card<br>front and back |
| <input type="checkbox"/> Social Security Card                             | <input type="checkbox"/> Power of Attorney                           |
| <input type="checkbox"/> Medicare Card - front and back                   | <input type="checkbox"/> Photo ID (Government issued)                |
| <input type="checkbox"/> Other Medical Insurance Card -<br>front and back | <input type="checkbox"/> Living Will/Advance Directive               |
|   | <input type="checkbox"/> Long Term Care Insurance Policy             |
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### Copies of the following financial documents:

- |  |                                  |  |                                |
|--|----------------------------------|--|--------------------------------|
| <input type="checkbox"/> All bank statements:  |                                  |  |                                |
| <input type="checkbox"/> Checking  | <input type="checkbox"/> Savings | <input type="checkbox"/> Certificates of Deposit                     | <input type="checkbox"/> Other |
| <input type="checkbox"/> Most recent Social Security check<br>(usually on bank statement)        |                                  | <input type="checkbox"/> Life Insurance statements                   |                                |
| <input type="checkbox"/> Most recent pension check<br>(if applicable, usually on bank statement) |                                  | <input type="checkbox"/> Stocks                                      |                                |
|  |                                  | <input type="checkbox"/> Bonds                                       |                                |
|  |                                  | <input type="checkbox"/> Copy of real estate deed or recent tax bill |                                |
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### United Methodist Communities Form:

- Incoming resident information form