DESIGNATION OF RESOURCES FOR BURIAL FUNDS

Clear

Applicant/Recipient: _____ SSN: _____

Spouse's Name: _____ SSN: _____

SSI-Related Medicaid and State Funded Programs policies allow individuals and their spouses a burial fund exclusion of $2500. This means that up to this amount of funds (or, if not funds, this value of non-liquid resources) will not be counted when the department determines eligibility for Medicaid assistance, as long as:

- the funds are clearly designated as being set aside for burial, and
- kept separate from non-burial resources, unless impossible to separate.

This exclusion applies to **each person,** the individual requesting assistance and the individual's spouse. You may designate resources for burial for any month, including the three months prior to the month of application. **It is not necessary to list the resource(s) the person owns if none are designated for burial.**

Resource Type	**Resource Description** (include name of financial institution, insurance company, location, account or policy number, etc.)	**Resource Value**	**Amount Designated**	**Name of Owner**	**Name of Designated Person**

I must provide proof to my public assistance specialist that the designated resources have been separated, or an explanation of why they can not be separated, within ten days of signing this statement. If I do not provide this information within ten days, the department cannot exclude these funds until the proof is provided.

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☐ **I understand the above information and designate the resource(s) listed above for burial expenses.**

☐ **I DO NOT wish to designate resources for burial.**

Applicant/Recipient Signature: _____ Date: _____

Spouse's Signature: _____ Date: _____

Designated Representative: _____ Date: _____

Distribution of Copies: Original – To case file
Copy – To client