



If you placed an in the NO or NOT SURE box in question 3, answer all of the following questions. If you are married and living with your spouse, you must answer all of the questions for both of you.

4. Enter below money amounts of all bank accounts, investments or cash that you, your spouse, if married and living together, or both of you own. Also include items that either of you own with another person. Include only dollar figures not account numbers. If you or your spouse do not own any item listed, alone or with another person, place an in the **NONE** box. Do **NOT** include a back payment from Social Security or SSI received in the last 10 months.

• Combined total of all bank accounts (checking, savings and certificates of deposit)	<input type="checkbox"/> NONE	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
• Combined total of all stocks, bonds, savings bonds, mutual funds, Individual Retirement Accounts or other similar investments	<input type="checkbox"/> NONE	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
• Any other cash at home or anywhere else	<input type="checkbox"/> NONE	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>

5. Will some money from the sources listed in **question 4** be used to pay for funeral or burial expenses?

If YES, skip to question 6.

If **NO**, place an in the **NO** box, then go to question 6.

YOU: **NO** SPOUSE: **NO**

6. Other than your home and the property on which it is located, do you or your spouse, if married and living together, own any real estate? Examples of other real estate are summer homes, rental properties or undeveloped land you own which is separate from your home.

YES **NO**

7. Not counting your spouse if you are married, how many other relatives live in your household and receive **at least one-half** of their financial support from you or your spouse? We count relatives related to you by blood, marriage or adoption.

Place an in only one box. Do not include yourself or your spouse in the number you enter. If your household consists only of you or you and your spouse, place an in the **NONE box.**

NONE **1** **2** **3** **4** **5** **6** **7** **8** **9 or more**



8. If you or your spouse, if married and living together, receive **income** from any of the sources listed below, you must answer the questions for both of you. Please enter the total amount you receive each month. **If the amount changes from month to month or you do not receive it every month, enter the average monthly income for the past year for each type** in the appropriate boxes. Do not list wages and self-employment, interest income, public assistance, medical reimbursements or foster care payments here. If you or your spouse do not receive income from a source listed below, place an in the **NONE** box for that source.

		Monthly Benefit
• Social Security benefits before deductions	<input type="checkbox"/> NONE	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
• Railroad Retirement benefits before deductions	<input type="checkbox"/> NONE	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
• Veterans benefits before deductions	<input type="checkbox"/> NONE	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
• Other pensions or annuities before deductions . Do not include money you receive from any item you included in question 4.	<input type="checkbox"/> NONE	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
• Other income not listed above, including alimony, net rental income, workers compensation, private or state disability payments, etc. (Specify): _____	<input type="checkbox"/> NONE	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>

9. Have any of the amounts you included in question 8 decreased during the last two years?

YES **NO**

If you have worked in the last two years, you need to answer questions 10-14. If you are married and living with your spouse and either one of you has worked in the last two years, you need to answer questions 10-14. Otherwise, skip to question 15.

10. What do you expect to earn in wages before taxes and deductions **this calendar year?**

YOU: **NONE** \$, .

SPOUSE: **NONE** \$, .



11. What do you expect your net earnings from self-employment to be **this calendar year**?

Place an in the **NONE** box if you are not self-employed and go to question 12.

YOU: NONE \$, .

SPOUSE: NONE \$, .

Place an in the box(es) if you or your spouse expect a net loss.



YOU: SPOUSE:

12. Have the amounts you included in questions 10 or 11 decreased in the last two years?

YES NO

13. If you or your spouse, stopped working in 2009 or 2010, or plan to stop working in 2010 or 2011, enter the month and year.

YOU:

M M Y Y Y Y

SPOUSE:

M M Y Y Y Y

EXAMPLE

For January – September, place a zero (0) in the first box. May 2010 should read:

0	5	2	0	1	0
M	M	Y	Y	Y	Y

If you are younger than age 65, answer question 14. If you are married and living with your spouse and either one of you is younger than age 65, continue to question 14. Otherwise, skip to question 15.

14. Do you or your spouse have to pay for things that enable you to work? We will count only a part of your earnings toward the income limit if you work and receive Social Security benefits based on a disability or blindness and you have work-related expenses for which you are not reimbursed. Examples of such expenses are: the cost of medical treatment and drugs for AIDS, cancer, depression or epilepsy; a wheelchair; personal attendant services; vehicle modifications, driver assistance or other special work-related transportation needs; work-related assistive technology; guide dog expenses; sensory and visual aids; and Braille translations.

YOU: YES NO

SPOUSE: YES NO

15. **Information about Medicare Savings Programs:** You may be able to get help from your state with your Medicare costs under the Medicare Savings Programs. To start your application process for the Medicare Savings Programs, Social Security will send information from this form to your state unless you tell us not to. **If you want to get help from the Medicare Savings Programs, do not complete this question. Just sign and date the application and your state will contact you.**

If you are **not** interested in filing for the Medicare Savings Programs, place an in the box below.

No, do not send the information to the state.



Signatures

IMPORTANT INFORMATION - PLEASE READ CAREFULLY

I/We understand that the Social Security Administration (SSA) will check my/our statements and compare its records with records from Federal, State, and local government agencies, including the Internal Revenue Service (IRS) to make sure the determination is correct.

By submitting this application, I am/we are authorizing SSA to obtain and disclose information related to my/our income, resources, and assets, foreign and domestic, consistent with applicable privacy laws. This information may include, but is not limited to, information about my/our wages, account balances, investments, benefits, and pensions.

Unless I/we answered "No" to Question 15, I am/we are authorizing SSA to disclose to the state the financial information listed above and other individually identifiable information from my/our file, such as my/our name(s), date of birth, gender and social security number(s) to start the application process for Medicare Savings Programs.

I/We declare under penalty of perjury that I/we have examined all the information on this form and it is true and correct to the best of my/our knowledge.

Please complete Section A. If you cannot sign, a representative may sign for you. If someone assisted you, complete Section B as well.

Section A

Your Signature:		Date:	Phone Number: () -	
Spouse's Signature:		Date:		
Your Mailing Address:				Apt. #:
City:		State:	Zip Code:	

If you changed your mailing address within the last three months, place an here:

If you would prefer that we contact someone else if we have additional questions, please provide the person's name and a daytime phone number.

Print First Name:	Print Last Name:	Phone Number: () -
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Section B

If someone assisted you, place an in the box that describes that person and provide the rest of the information requested below.

<input type="checkbox"/> Family Member	<input type="checkbox"/> Attorney	<input type="checkbox"/> Other Advocate	<input type="checkbox"/> Other
<input type="checkbox"/> Friend	<input type="checkbox"/> Agency	<input type="checkbox"/> Social Worker	Specify: _____

Print First Name:	Print Last Name:	Phone Number: () -
Address:		Apt. #:
City:		State: Zip Code:



Privacy Act / Paperwork Reduction Notice

Section 1860 D-14 of the *Social Security Act* authorizes the collection of information requested on this form. The information you provide will be used to enable the Social Security Administration (SSA) to determine if you are eligible for help paying your share of the cost of a Medicare Prescription Drug plan. You do not have to give us the information requested. However, if you do not provide the information, we will be unable to make an accurate and timely decision on your application. We may provide information collected on this form to another Federal, State, or local government agency to assist us in determining your initial or continuing eligibility for the Extra Help or if a Federal law requires the release of information. We also may need to share the information with other SSA programs if SSA needs to determine your eligibility in those programs.

We also may use the information you give us when we match records by computer. Matching programs compare our records with those of other Federal, State, or local government agencies. Many agencies may use matching programs to find or prove that a person qualifies for benefits paid by the Federal government. The law allows us to do this even if you do not agree to it. Explanations about these and other reasons why information you provide us may be used or given out are available in Social Security offices. If you want to learn more about this, contact any Social Security office.

Paperwork Reduction Act Statement — This information collection meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the *Paperwork Reduction Act of 1995*. You do not need to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take about 30 minutes to read the instructions, gather the facts, and answer the questions. You may send comments on our time estimate above to: SSA, 6401 Security Blvd., Baltimore, MD 21235-6401. **Send only comments relating to our time estimate to this address, not the completed form.**

SEND THE COMPLETED FORM TO US AT THE ADDRESS SHOWN ON THE ENCLOSED PRE-ADDRESSED, POSTAGE-PAID ENVELOPE:

**Social Security Administration
Wilkes-Barre Data Operations Center
P.O. Box 1020
Wilkes-Barre, PA 18767-9910**