

# STOP:

## Where can I check my benefits?

(Please check out the Social Security Website at <https://www.ssa.gov/myaccount> or Visit your local Social Security Administration Office to obtain a Benefits Letter)

## California Intake Sheet

Settlement Amount: \_\_\_\_\_. How much Assets & Income do I have: \_\_\_\_\_

### I receive the following Government Benefits:

- Supplemental Security Income (SSI) How Much: \_\_\_\_\_
- I receive
  - I have limited income and insufficient work history
  - I am disabled and unable to work
  - I receive my check on the 1<sup>st</sup> of the month
- Medicaid (Medi-Cal in California)
- Low Income
  - I receive Supplemental Security Income (SSI)
  - In-Home Support Services Recipients
  - Long Term Care Facility Residents
- Social Security Disability Insurance (SSDI) How Much: \_\_\_\_\_
- I worked at least 40 Social Security Credits
  - I receive more than the Social Security Income (SSI) Amount
  - I receive a payment based on my birthday and it is typically not scheduled on the first of the month
- Medicare
- I have been on SSDI Benefits for at least 24-months

### Am I married: Yes No

*If yes,*

My Spouse/Partner receives Government Benefits.

*If selected please select the Government Benefits below:*

- |   |   |
|---|---|
| <input type="checkbox"/> Supplemental Security Income (SSI) | <input type="checkbox"/> Social Security Disability Insurance |
| <input type="checkbox"/> Medicaid                           | <input type="checkbox"/> Medicare                             |

### Do I have children: Yes No

*If yes,*

My child receives Government Benefits.

*If selected please select the Government Benefits below:*

- |   |   |
|---|---|
| <input type="checkbox"/> Supplemental Security Income (SSI) | <input type="checkbox"/> Social Security Disability Insurance |
| <input type="checkbox"/> Medicaid                           | <input type="checkbox"/> Medicare                             |

**Disclaimer: Everyone situation is unique; this basic qualification form is just an educational form. We do recommend to please contact a Special Needs Attorney or contact CPT Institute to analyze your situation with a professional to ensure you are preserving your benefits.**

# Do My Government Benefits Need Protecting? (In California)

## Qualifications

Please contact CPT Institute to schedule your no-cost consultation.

At any time on this sheet if you selected **YES** to Supplemental Security Income (SSI) you, your spouse, or children's government benefits **WILL NEED** protecting.

If your Social Security Disability Income (SSDI) is **LESS THAN** the Supplemental Security Income (SSI) amount. Your government benefits **WILL NEED** protecting.

## Not Qualified

If your Social Security Disability Income (SSDI) is **MORE THAN** the Supplemental Security Income (SSI) amount. Your government benefits **WILL NOT NEED** protecting.

If I am low income, qualified for Medicaid, **not disabled, and I do not have Supplemental Security Income (SSI)**. Your government benefits **WILL NOT NEED** protecting.

The Medicaid that you are on is Income Based.

This means you can work, and your income is below 138% of the Federal Poverty Level.

You have MAGI Medicaid based on the household income. Lastly, your Assets are not counted towards your eligibility

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