



Financial Documentation Checklist

(Complete only if interested in a reduced daily rate)

Necessary Information to Gather for Application to Compass Regional Hospice
Residential Center

- _____ Previous 2 years tax returns
- _____ Pension statements (last 3 months)
- _____ Social Security Statements (last 3 months)
- _____ Other income, i.e.: unemployment benefits, child support, alimony
- _____ Bank statements, all accounts, checking, saving, CDs
- _____ Stock, Bonds, Mutual funds, Annuities
(last 3 months)
- _____ Life Insurance Policy, Life insurance statements
- _____ Utility bills (last 3 months)
 - _____ Electric
 - _____ Telephone
 - _____ Gas
 - _____ Water/Sewer
 - _____ Property taxes
- _____ Medical Bills, Medications (past 3 months)
- _____ Loans, Mortgages, Auto Statements (past 3 months)
- _____ Credit Card Payments (last 3 months)
- _____ Insurance premiums (last 3 months or annual bill if paid annually)