

# Care Home Admission Checklist

Moving into a care home involves a lot of preparation. Use this checklist to ensure you have all the necessary documents and information ready for the financial assessment and admission process.

## Personal Documents

- Birth Certificate
- Marriage/Civil Partnership Certificate
- National Insurance Number
- Passport or Driving Licence (for ID)
- Power of Attorney documents (Enduring or Lasting)

## Financial Information (Income)

- State Pension details (letter from Social Security Agency)
- Private/Occupational Pension statements
- Pension Credit award letter
- Attendance Allowance / DLA / PIP award letters
- Details of any other benefits

## Financial Information (Capital & Assets)

- Bank statements for all accounts (last 3-6 months)
- Building society passbooks
- Post Office / National Savings certificates
- Premium Bonds certificates
- Stocks, shares, and unit trust certificates
- Details of any property owned (deeds, valuation)

## Expenditure Details

## **Care Home Admission Checklist**

- [ ] Council Rates bill
- [ ] Ground rent or service charges
- [ ] Life assurance policies
- [ ] Funeral plan details