

Checklist for Veteran's Pension

1. Copy of **Discharge** from Military (**DD-214**)
2. Copy of **Marriage License** for current marriage
(Date and location of marriage and date and location of each past divorce or death)
3. Copy of **Death Certificate** (if spouse is deceased)
4. **Aid & Attendance Form, VA Form 21-2680** needs to be filled out and signed by a doctor, Physician Assistant, or Nurse Practitioner (Registered Nurse cannot sign)
5. All **Medical Expenses** that are paid out of pocket that are not reimbursed - expenses that are ongoing and reoccurring
Examples: Health Insurance Deductions, Medicare Premiums, Supplemental Insurance Premiums, RX – Prescription Drugs (get a Pharmacy printout for past year \$500.00 or more per year)
6. If residing in an **Assisted Living/ Nursing Home facility**, VA needs a **Letter on letterhead** from the facility stating:
Date of Entry, Level of Care, and Cost of Living Amount (monthly or yearly)
Worksheet for facility on Pension Claim must be completed by them (Page 13)
7. **Blank Voided Check** for Direct Deposit OR **Bank Info Sheet** showing
Routing # & Checking Account #
8. All **Net Worth:** Checking, Savings, CDs, IRAs, Stocks, Bonds, Mutual Funds, etc. (all monies that the IRS can see)
Two most recent **Monthly Bank Statements** for checking and savings
Most recent statements for other assets, such as CDs, IRAs, and annuities
9. **Monthly Income:** Employment, Social Security, Retirement, Pension, Unemployment, etc. If you receive **Social Security**, we will need the most recent social security statement that shows Medicare deduction and we will need amount per month for other income
10. **Copies of all Insurance Cards:**
(Medicare, Supplemental Insurance, Health Insurance, etc.)
11. Do you own your **primary property**, if so, what is the size of your lot; **square feet** and/or other property. Do you receive rent as income for other property you own? If so, **how much per month?**
12. **Caregiver Form** (if caregiver is being paid)
In-Home Attendant Worksheet on Pension Claim must be completed by your Caregiver (Page 12)