

DOCUMENTATION CHECKLIST

The following documents are needed in order to complete a V.A. Application for the Improved Pension Benefits with Aid and Attendance.

These documents alone do not constitute a full application:

- ☐ Your Discharge/Separation papers (DD-214 if discharged after January 1, 1950.) We can provide a form to request one from the V.A.
- ☐ Physician statement completed by your Primary Care Physician (we provide the required form to give to the physician) which includes current diagnosis, medical status, prognosis, ability to care for self, ability to travel unattended, with physician's name, address, and phone number.
- ☐ Information for ALL marriage(s) of veteran, spouse, or surviving spouse(s) to include: date(s) of marriage(s), place(s) of marriage(s), name(s) to whom married, if a marriage ended whether it ended by death or divorce, date(s) of death(s) or divorce(s), place(s) of death(s) or divorce(s).
- ☐ If applying as a surviving spouse: a copy of death certificate with the cause of death of the veteran.
- ☐ Copy of your current Social Security Award Letter (the letter that Social Security sends at the beginning of the year stating what your monthly amount will be for the next year) for the veteran and the veteran's spouse (if any) or the surviving spouse.
- ☐ Complete copy of most recent account statements for: bank account(s), CDs, trusts, stocks, bonds, annuities, whole life insurance policies, etc.
- ☐ Copy of last year's income tax return, if required to file one.
- ☐ Proof of income (statement or 1099) from pensions, retirements, interest income from CDs, annuities, etc. Must verify gross income amount.
- ☐ Proof of recurring medical expenses (invoices or statements) not reimbursed by insurance, Medicare, or Medicaid. Examples: Medicare supplemental insurance premiums, Life-Line, adult daycare, home health care, and assisted living facility but not prescriptions or copays.
- ☐ Voided check for Direct Deposit.
- ☐ Caregiver information: name, address, phone number.
- ☐ If married, named, date of birth, and Social Security Number of spouse.