

Information Needed For Veterans or Survivors Pension Claims:

- DD-214 or Report of Separation (WW2 Veterans Only)
- Widow(er): Should submit veteran's death certificate
- Copy of Marriage License (if married)
- Copy of Birth Certificates for DEPENDENT Children
- Divorce papers or death certificate for all prior marriages of either the veteran or spouse/widow(er)
- Social Security number for **each household family member**

Gross Income for each family member to include (IF APPLICABLE):

- Earnings from employment
- Social Security (Bring statement if possible)
- Company or Union pension
- Net income from business operation or rental income (may be asked to show expenses and gross income information)
- Unemployment benefits (including dates for first and last checks)
- Sick pay or disability pay including Workman's Compensation (also provide dates for first and last checks)
- Life insurance proceeds
- Amount of SSI benefits awarded
- FIA (Department of Social Services) assistance (includes ADC and General Assistance)
- Any other income source (e.g., Land Contract, Savings Bonds, Stocks, Money Certificates, IRAs, 401-Ks, Royalties, trusts, etc.)

The VA has a 3 year look back on all sold, transferred, conveyed, gave away or traded assets.

Total asset LIMIT per the VA is approx. \$138,000.

The VA will need any information about annuities or trusts that have been set up within 3 years.

If the primary residence is owned, the VA will want the size of the lot (square footage) and if any of the property can be sold WITHOUT selling the primary residence.

- Current value of savings and/or checking accounts, real estate (excluding home), or non-essential personal property
- Interest statements and/or account books from banks, credit union, etc.
- A voided personal check or the account number and routing number of either checking or savings account (for direct deposit)

Out of pocket medical expenses for all family members:

- Health insurance premiums, Medicare premiums, supplemental health insurance premiums, nursing home expenses, home health care.

If Applicable:

- If in a nursing home, have VA Form 21-0779 and Nursing Facility Worksheet completed by the nursing facility.
- If it's In-home healthcare, have In-home healthcare Worksheet completed by the provider.
- If you require the Aid and Attendance to perform life's daily necessities, has the VA Form 21-2680 been completed by your doctor?