

VETERAN'S PENSION CLAIM CHECKLIST

Appointment Date: _____

NEED THE FOLLOWING ITEMS:

_____ **DD214 or Military Separation Papers (Honorable Wartime Service)**

_____ **Marriage Certificate (If applicable)**

_____ **Prior Marriage Information (if applicable) – Divorce Decrees or Prior Spouse Death Certificate**

_____ **Birth Certificate/Social Security Card – Dependent Child (If applicable)**

_____ **Nursing Home/Assisted Living Letter (statement on letterhead indicating the date admitted, level of care, and amount paid per month by the veteran).**

_____ **Medicaid Approval Letter (DSS)(If applicable)**

_____ **Power of Attorney – if family member inquiring about benefits**

_____ **Voided Check (for direct deposit)**

_____ **Insurance/Medicare/Medicaid Card (for Veteran only)**

Information needed on spouse (if applicable):

Name _____

Social Security # _____

Date of Birth _____

**Because VA Pensions are “financially needs based”, the following information
will be needed to process Pension Claims**

Where did veteran work last? _____

When did the veteran last work? _____

Amount of annual earnings? **\$** _____

GROSS INCOME VERIFICATION:

_____ **Social Security Benefits Letter (to show amount paid by the veteran for
SSA Medicare Parts B/C/D)**

_____ **Retirement/Annuity Statement(s)**

_____ **Interest/Dividend Statement(s)**

ASSETS (current statements on all accounts):

_____ **Stock/Bonds**

_____ **Checking/Savings**

_____ **CD's**

_____ **IRA'S**

_____ **Money Market**

_____ **Other Property (Value of second homes, business, farm etc.).**

DEDUCTIBLE EXPENSES THAT CAN BE COUNTED:

_____ **Supplemental Insurance (How much and who with?)**

_____ **Burial Expenses (current year only); (need paid receipt)**

_____ **Lifeline/Cancer Policy (How much and who with?)**

Eligibility for Veterans Pension:

Veterans with low incomes who are either permanently and totally disabled to work, or age 65 and older, may be eligible for monetary support if:

- 1) They have 90 days or more of active duty military service (not active duty for training);
- 2) One day of the above period which was during a period of war.

The 90-day active service requirement does not apply to veterans with a service-connected disability justifying discharge from the military. Veterans who enlisted after September 7, 1980 must have served 24 continuous months or the full period for which they were called to active duty in order to be eligible.

All forms must be signed by veteran. If the VA determines that the veteran is incompetent, a fiduciary (payee) will be assigned at that time to manage VA funds for the veteran; however, until VA makes a determination of incompetency no one is able to sign for the veteran. Discuss why it is important that any and all income be reported to the VA, even though they may think that an amount would not count because it is too small. All income is countable for VA purposes and if any unreported income is discovered, it will create an overpayment and the money will have to be repaid to the VA, can even be garnished from Social Security benefits.

ASSETS: Veteran and spouse's assets together cannot be over \$80,000.00. The VA does not count the home lived in, a reasonable amount of land, and vehicles.