



Documents Required VA Pension Benefit

Please bring as many of these as you can to first meeting:

- _____ Original or Certified Copy Form DD214 (military discharge papers)
- _____ Birth Certificate – Veteran and Spouse
- _____ Death Certificate – if Veteran is deceased
- _____ Marriage/Divorce certificates (copies) – of current and any prior marriages for both Veteran and spouse
- _____ Voided check for deposit of VA pension
- _____ Social Security - most current year annual statement showing gross benefits, deductions, net monthly payment for coming year
- _____ Most recent statements of **income**:
 - Pension,
 - US Civil Service,
 - US Railroad Retirement,
 - SSI/Public Assistance,
 - Other: _____
- _____ Current statements for all **assets**:
 - bank accounts,
 - insurance policies,
 - annuities,
 - retirement accounts,
 - brokerage accounts
 - Other: _____
- _____ Current premium statements for all **medical insurance premiums**:
 - Part D,
 - Medicare supplement,
 - Long term care insurance
 - Other: _____
- _____ Most recent statement from nursing home/assisted living facility
- _____ Most recent tax returns filed by Veteran/spouse
- _____ Current Powers of Attorney – both Veteran and Spouse