



## Pension Checklist

- 90 days active with 1 day during wartime (unless discharged due to disability) \*before 9/8/80 if enlisted or 10/16/81 if officer, otherwise longer service may be required.
- 65+, or totally disabled from physical/mental condition(s) likely to be permanent.
- Net Worth and Assets less than \$80,000 (not including home, vehicles or general belongings). Must meet certain income requirements based on specific program and need for care.

### **Documents:**

- DD214 or Report of Separation

### **Dependent Information:**

- Marriage Certificate
- Death Certificate
- Divorce Decrees
- Prior Marriage info (veteran and spouse)
- Birth Cert for dependent children (< 18, 18-23 if in school, or helpless child)
- Dependent information (full name, social security numbers, date of birth)

### **Income:**

- Proof of Gross income from all sources (statement copy preferred)
- Proof of assets (Copies of most recent statements)
- Annuity contract and statement as to surrender value as applicable
- Complete copy of Trust with itemization showing values
- Direct Deposit info: routing/account/bank name/address/phone #

### **Medical:**

- Care Expense Statement
- VA form 21-2680 Examination for HB/A&A
- Medical Expenses (insurance premiums, in home care expenses, assisted living expenses, nursing home expenses)
- Death expenses