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IMPORTANT VA “PENSION” CHECKLIST

Please check this list and make sure the proper documents are attached and appropriately filled out.

- 1). ORIGINAL Military discharge papers (DD-214) or discharge/separation papers.
- 2). Marriage certificate, not license, (for married veteran or a surviving spouse)
- 3). ORIGINAL Veteran's death certificate, with cause of death.
- 4). All unreimbursed, recurring medical expenses, e.g., medical, prescription, home care, assisted living, nursing home bills/expenses/receipts, as well as Medicare Part B premiums, Medicare Supplement insurance premiums, for BOTH spouses, if both living.
- 5). Checking, savings, CDs, stocks, annuities, life insurance and IRAs account statements for BOTH spouses, if both living.
- 6). Statements of the interest earned, dividends, and cash values of above assets for BOTH.
- 7). If married more than once, provide pertinent information on all previous marriages (to whom, when, date of marriage, date marriage ended, and how it ended).
- 8). Social Security “Award Letters” for BOTH (the letters we receive every December showing how much benefit we will receive in the next year. It also shows the Medicare premium)
- 9). All other sources of income, e.g., pensions, annuities, Long Term Care Insurance benefits, disability benefits, etc, for BOTH spouses.
- 10). Social Security & Medicare Cards & Medicare Supplement information, picture ID (e.g., driver license) for BOTH.
- 11). Get medical records from your doctor. Also, contact information on your doctors, your visits to them, treatment, and any recent hospitalizations.
- 12). Paperwork relating to any past or present VA benefits received by Claimant.

When we meet, there will be other information and forms, involving medical statements, assisted living reports and various releases and designation. The VA will ask for the right to obtain these records, but they are now telling you of a representative—if desired. It is faster and better if you can get doctors records.

- Tom Willoughby, JD