

## **Preparation Checklist (Initial Meeting)**

To best prepare for your initial meeting with a Life Resource Planner, we recommend you have the following documents and information at your fingertips so we can determine eligibility for the VA benefit in addition to other benefits you may be eligible for. It's OK to ball-park these figures for now, however, the exact figures and supporting documents will be required on the VA application.

### **For VA Eligibility**

#### *Dates of Service:*

- You can determine this from the DD-214 Discharge Papers. Most likely the Veteran will be able to recall the dates but we will need the DD-214 to complete the application process. If you cannot locate the documents, we will need to order a copy.

#### *Financials:*

- Monthly Gross Income for both Veteran and Spouse (if applicable)  
Include social security, pension, interest, dividends, IRA distributions, rental income, business income, wages or salaries.
- Liquid Assets for both Veteran and Spouse (if applicable)  
Include CD's, Bonds, Stocks, Mutual Funds, Checking and Savings Accounts, Money Market Accounts, Annuities, coin or art collections, and any assets that can be converted to cash.

#### *Property:*

- Value of house and any other real estate, including recreational property, that is currently in the Veteran and/or Spouse's Name. Tell us if any other names are on the deed(s).

#### *Personal Care, Medical Expenses & Insurance Premiums:*

- List the current costs for their personal care (include assisted living cost and/or home care; and personal care supplies.)
- List of health care expenses. (Include Medicare Part B premiums, health insurance premiums, prescription drug plans, co-pays, co-insurance, and any out-of-pocket costs associated with their health care. Be sure to include any premiums for long-term care insurance, if any. Also include the life insurance, if any.)

#### *Legal Documents*

- If you or another member has a Durable Power-of-Attorney, please have it with you or know the date it was signed. If you need health-care directives, we will be happy to provide this at no cost.

Please have these figures handy for your first meeting. If you have any questions prior to then, please feel free to call. Your advisor will guide you through the planning process every step of the way.