Required and or Useful Documentation Needed in a Pension Claim

- DD214 or Notice of Separation (typically WWII veterans have the NOS)
- ALL Marriage License or Certificate (for both the veteran and spouse)
- ALL Any Divorcee Decrees
- Net Worth information (Current amounts in banking accounts, IRAs, stocks, etc)  
  o Assets must be less than $80k (excluding owning your primary home)  
  o If assets are near $80k and will soon diminish, we can start the application process
- Income information (Personal pensions, Social Security amounts, employment, etc)
- Banking information (if any award is granted, the VA will want to use Direct Deposit)
- Statements or receipts of all non-reimbursable medical expenses from the past year for the veteran and spouse. This includes:  
  o Medicare costs (Part A-D costs)  
  o Payments for supplemental insurances  
  o Medical bills that have been paid for (including hospital stays, medical tests, etc)  
  o Prescriptions  
  o Copays to visit any medical professional’s office  
  o Medical equipment  
  o Eye and dental expenses

It may benefit you to begin saving receipts for any medical expenses as the VA reserves the rights to do audits.

There are additional VA Forms that will need to be completed, if applicable, by a primary care physician, assisted living facility, nursing home, and or by the caretaker. We will further assist you in extra documentation needed to process the Pension Claim. Please give our office a call if you need to set up an appointment to get a pension claim started.