INSTRUCTIONS FOR COMPLETING INFORMATION SHEET

PAGE 1 INSTRUCTIONS

SECTION I: INFORMATION ON THE VETERAN

Complete all blocks as appropriate. Make sure to include the Veterans Social Security Number in the appropriate block.

All currently married Veterans and Widows need to complete this information. Minimum requirements are Month and Year of marriage and City and State.

Veterans who are not currently married should check the appropriate block.

SECTION II: INFORMATION FOR SPOUSE OR WIDOW

This section is used to identify the spouse or widow. All blocks need to be completed.

If the veteran is currently not married, skip this section.

SECTION III: WHO TO CONTACT AND WHERE TO MAIL

This section is where all correspondence will be submitted. Please include all information legibly. If you cannot receive and print forms on your computer, please do not include an email address.

SECTION IV: MILITARY INFORMATION

Use this section to identify military information. Include as much information as possible.

SECTION V: ASSISTED LIVING/RESIDENTAL CARE/SKILLED NURSING INFORMATION

If you are applying for Pension because you are currently residing in one of these types of facilities please complete this section. All blocks must be complete.

SECTION VI: HOME CARE INFORMATION

If you are currently living at home or in an independent living situation and are paying someone to provide medical or nursing services complete all information in this section.

PAGE 2 INSTRUCTIONS

GROSS INCOME:

Please note that this is not a guessing game. In order to apply for the VA Pension you need to provide exact information. If the income information provided is not the correct amount your claim may be delayed. Gross income is not necessarily the amount that is deposited in your bank.

Gross Income is the amount before any taxes or insurance or other withholding is taken out.

If you receive a pension or income not listed on the form, include the name of the source of the pension in the appropriate block.

MEDICAL EXPENSES:

MEDICARE: The amount that is taken out of your social security to pay for Medicare Part B. Even if you have an HMO such as Kaiser you probably have Medicare deducted from your check. You will have to check your latest social security statement to find out how much you pay.

Do not list any amounts paid to a provider only the amount that is taken out of your Social Security Check or paid directly to Social Security.

HEALTH INSURANCE: Include all payments for health insurance, supplementary health insurance, HMO's etc. Identify the name of the insurance company in the source block.

Do not include deductibles, co-pays or other payments.

If you have Long **Term Care Insurance** list the provider and amount that you are currently paying.

ASSETS:

CHECKING: List your average balance in non-interest bearing checking accounts. If your checking account pays any interest, please list under Savings/CD's. If you are a joint owner of an account with someone other than your spouse, list your share of the account.

SAVINGS/CD'S: List the average balance in interest bearing accounts. If you are a joint owner of an account with someone other than your spouse, list your share of the account.

STOCKS/BONDS/MUTUAL FUNDS: List amounts in these types of accounts. If you are a joint owner of an account with someone other than your spouse, list your share of the account.

OTHER ASSETS: Do not include the value of the house you live in or other personnel assets used for everyday living.

DOCUMENTATION REQUIRED:

Please include the appropriate documentation.

NOTE REGARDING YOUR MILITARY DISCHARGE CERTIFICATE

WWII: Veterans were give various documents to verify their discharges. The documentation most commonly used for enlisted personnel was "Enlisted Report of Separation and Honorable Discharge". Whatever document you provide it must indicate the date of entry, date of separation and the character of discharge (Honorable, General etc) In some instances you may need to provide two documents that indicate this information.

POST WWII After WWII all veterans were given DD Form 214. This is the document that is required to be submitted.

PAGE 3

IF YOU HAVE ONLY BEEN MARRIED ONCE YOU DO NOT NEED TO COMPLETE OR RETURN THIS PAGE

VETERANS WHO ARE CURRENTLY WIDOWED OR DIVORCED DO NOT NEED TO COMLETE THIS PAGE.

Complete this section for all previous marriages.

Minimum information is Month and Year and City and State of each marriage and each termination of the marriage.

Widow's who may have no knowledge of the veterans previous marriage do not need to complete information for the veteran, but MUST provide all information about their previous marriages.

If the widow does not know information regarding the previous marriage, check the block that indicates I know of no legal impediment to my marriage.