

Checklist: VA PENSION

Sherburne County Veterans Service Office
March 5, 2021



Please use this checklist to ensure the required documents are attached and properly filled out.

- Military discharge papers (DD-214 or discharge papers or separation papers)
- Marriage certificate, not license (if you are a married Veteran or a surviving spouse) and the Social Security numbers for the Veteran and Spouse
- Physician's form VA form 21-2680 (must be filled out and signed by the applicant's doctor)
- Veteran's death certificate (if you are a surviving spouse)
- Nursing home form VA form 21-0779 (must be filled out by the nursing home or assisted living facility) or a letter from the facility confirming residency and cost
- If you reside in an assisted living facility provide the contract/rental agreement and a breakdown of the care package (if applicable)
- List all unreimbursed, recurring monthly medical expenses (such as assisted living, home health care, insurance premiums, recurring prescriptions, etc.)
- List your monthly Medicare premium deduction
- List all net worth (i.e. savings, checking, CDs, stocks, bonds, 401k or IRAs) including the accompanying interest and/or dividends
- Banking information including account and routing numbers for direct deposit (voided check)
- Indicate whether you've been recently hospitalized
- If married more than once, provide pertinent information on previous marriages (to whom, when, date of marriage, date of divorce and how it ended)
- Ensure the documents are legible and clearly identified?

<https://www.va.gov/pension/eligibility/>

**We will need copies of your income statements for the current year
(i.e. Social Security benefit statement, bank statements, current pension statements, etc.)
All gross monthly income must be reported to the VA.**

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