**CHECKLIST OF DOCUMENTS TO SUPPORT VA CLAIM**

\_\_\_\_\_ Military Separation Papers (DD214), include ALL DD214’s issued to Veteran. If you don’t have this you can go to <http://www.archives.gov/veterans/military-service-records/> to get a copy.

\_\_\_\_\_ Marriage certificate for most recent marriage

\_\_\_\_\_ Death certificates/Divorce decree(s) for ALL prior marriages for veteran and spouse

\_\_\_\_\_ Birth dates of veteran and spouse

\_\_\_\_\_ Social Security Numbers for veteran and spouse

\_\_\_\_\_ Letter from Assisted Living Facility / Home Health Care Provider showing:

 Date of Admission / start of care

 Type of care provided

Total monthly cost of care

\_\_\_\_\_ VA Form 21-2680 (Completed by a physician)

\_\_\_\_\_ Direct Deposit Information (Voided Check) from the spouse and/or veteran’s account.

Current statements from financial institutions to verify **ALL LIQUID ASSETS*,*** to include:

 \_\_\_\_\_ ALL checking statements

 \_\_\_\_\_ ALL savings statements

 \_\_\_\_\_ ALL investment accounts (i.e., stocks, bonds, mutual funds, IRA’s CD’s etc.)

 \_\_\_\_\_ ALL annuity accounts

 \_\_\_\_\_ ALL other assets and real property (excluding primary residence and vehicle)

 \_\_\_\_\_ ALL interest/dividends earned on assets for the previous year.

Letters/Statements to verify **INCOME FROM ALL SOURCES**, to include:

 \_\_\_\_\_ Social Security (S.S. award letter for the current year)

 \_\_\_\_\_ Civil Service Retirement

 \_\_\_\_\_ Private Retirement

 \_\_\_\_\_ Military Retirement

 \_\_\_\_\_ Long Term Care Insurance Payments received or expected to receive

 \_\_\_\_\_ All other income sources

\*\*Your bank statements will not be sufficient enough for this section above\*\*\*

Verification of all **ONGOING UN-REIMBURSED MEDICAL EXPENSES**, such as:

 \_\_\_\_\_ Health Insurance Premiums (monthly amount paid and name of provider)

 \_\_\_\_\_ Long Term Care Insurance Premiums (monthly amount paid and provider)

**\*\*The date eligibility begins the first day of the following month when the application is filed; therefore it is important to apply as soon as possible. However, it is your responsibility to make sure all supporting documents are sent to Advanced Retirement Planning for submission to the VA.**

**<<<Important compliance notice: If this checklist is to be shared with client/consumer, you must include your full disclosure here at the bottom of this document. Must also include this disclosure: This information is not intended to be a substitute for specific individualized tax, legal or investment planning advice as individual situations will vary.>>>**