

UPTAKE LIST
UNMARRIED SURVIVING SPOUSE PENSION CLAIM

Eligibility for Surviving Spouses: The Veteran must have been discharged under conditions other than dishonorable and must have had 90 days or more of active military service (not active duty for training); at least one day of which was during a period of war. The 90-day active service requirement does not apply to Veterans with a service-connected disability justifying discharge from the military. Veterans who enlisted after September 7, 1980 must have served 24 continuous months or the full period for which they were called to active duty in order to be eligible.

Spouses must have been married to the Veteran at the time of death—divorce severs eligibility to all VA benefits.

Assets and income: For 2020, the COMBINED income and assets threshold for a surviving spouse and dependents (under the age of 18) is: **\$129,094.00**. The VA does not count the home lived in, less than two acres of land, and vehicles into total assets. The income and assets threshold for surviving spouses adjusts each year based on cost of living fluctuation.

Surviving Spouse Identification Info Needed:

- DD-214 or military Separation Papers (honorable wartime service)
- Marriage Certificate
- Veteran's Death Certificate
- Prior Marriage Information
- Prior Divorce Decrees
- Prior Death Certificates—for Veteran and/or previous spouses
- Birth Certificate Dependent Child & Social Security Card
- POA of family member filing on behalf of surviving spouse
- Voided check/direct deposit information
- Medicare Card(s)
- Other Medical Insurance Card(s)
- Medicaid Card(s)
- Social Security Card(s)

Info Needed in Connection with A&A:

- VA Aid & Attendance Form (21-2680)
- Assisted Living Letter (statement on letterhead indicating the date admitted, level of care, and amount paid per month by the surviving spouse)
- VA Nursing Home Form 21-0779
- Worksheet for "An Assisted Living, Adult Day Care, or Similar Facility"
- Worksheet for "In-Home Attendant Expenses"
- Statement for facility providing in-home care on their letterhead with hours of service, services provided, and how much they are charging
- Caregiver Worksheet

Gross Income Verification:

- Social Security Verification Letter(s) (this letter will give amount paid for Parts B/C/D)
- Retirement/Annuity Statement(s)
- Interest/Dividend(s)
- Income from rental property
- Income from employment
- Income from unemployment
- Discontinued income from previous calendar year

Assets—Bank Statements needed for all accounts:

- Checking account
- Savings account
- Stocks/Bonds
- CD's
- IRA's
- Money Market
- Proof of value of land owned by surviving spouse – to include land exceeding 2 acres (i.e. end of year property tax statement)

Other Deductible Expenses:

- Itemized Paid Statement of Burial/Funeral Expenses—only if Veteran was receiving benefits from VA and has passed within the last year
- Supplemental Insurance (show on bank statement or statement from company)
- Life Alert
- Cancer Policy