

## UPTAKE LIST

### **VETERAN PENSION CLAIM**

*(MUST BE OVER SIXTY-FIVE OR PERMANENTLY & TOTALLY DISABLED TO WORK)*

**Eligibility for Veterans Pension:** Veterans with low incomes who are either over the age of 65 or who are permanently and totally disabled to work, may be eligible for monetary support if they have 90 days or more of active duty 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.

**All income is countable for VA purposes and if any unreported income is discovered, it will create an overpayment and the money will have to be repaid to the VA—this created debt can even be garnished from Social Security benefits.**

**Asset and income:** For 2020, the COMBINED income and assets threshold for a Veteran and dependents (to include spouse and dependents under the age of 18) is: **\$127,061.00**. The VA does not count the primary residence or vehicles into total assets. The income and assets threshold for Veterans and their dependents adjusts each year based on cost of living fluctuation.

#### **Veteran/Dependents Identification Info Needed:**

- DD-214 or Military Separation Papers (honorable wartime service)
- Marriage Certificate
- Prior Marriage Information
- Prior Divorce Decrees
- Prior Death Certificates—for previous spouses
- Birth Certificate & Social Security Card for Dependent Child
- POA if family member is filing claim on behalf of Veteran
- 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 veteran)—applicable for both Veteran and spouse
- VA Nursing Home Form 21-0779—applicable for both Veteran and spouse
- Worksheet for “An Assisted Living, Adult Day Care, or Similar Facility”
- Worksheet for “In-Home Attendant Expenses”
- Caregiver Worksheet

Statement from facility providing in-home care on their letterhead with hours of service, services provided, and how much they are charging

#### **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:**

- Checking account
- Savings account
- Stock account (value of stock)
- CD's
- IRA's
- Money Market
- Proof of value of ownership of land/home (i.e. end of year property tax statement)

#### **Other Deductible Expenses:**

- Supplemental Insurance
- Life Alert
- Cancer Policy

**Info Needed Regarding Work History:**

- Where did Veteran last work and what was his/her job title?
- When did job begin and end?
- Were there any days lost due to disability?
- Amount of annual earnings?