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Your One-Stop Resource for Long Term Care Planning!

ITEMS TO BRING WITH YOU TO THE VETERANS BENEFITS INITIAL/RETAINER APPOINTMENT

Please provide the information listed for the person in need of long term care, and, if married, his/her spouse.

LEGAL DOCUMENTS - Trusts and Trust Schedules, Last Will & Testament, Financial Power of Attorney, Medical or Health Care Power of Attorney, Mental Health Care Power of Attorney, Living Will

VETERAN SERVICE-RELATED DOCUMENTATION - Original or certified copy of Veteran's DD214 and/or Military Discharge Papers for all entries of service (service must be at least 90 days of active duty with at least one day during a wartime period). If you do not have either of these, please request a certified copy online at: <http://www.archives.gov/veterans/military-service-records/>.

VETERAN-RELATED INFORMATION - Veteran's Birth Certificate, Veteran's Social Security Card or number, Veteran's original copy of death certificate, Marriage certificate for this widow & Veteran (if benefits for widow)

VETERAN'S SPOUSE OR WIDOW-RELATED INFORMATION - Birth Certificate, Social Security Card or number, Marriage certificate for this widow & Veteran, Divorce decree(s) or death certificates from Veteran's previous marriage(s), Divorce decree(s) or death certificates from Widow's previous marriage(s)

VETERAN'S MEDICAL CONDITION-RELATED DOCUMENTATION - If Veteran sustained service-related injuries or environmental exposures that have caused the Veteran's current disabilities or aggravated the Veteran's disabilities, please provide these additional documents: Copies of medical records that support the service-related cause(s) of disability(ies), Copies of medical records that support current medical diagnoses and disability(ies)

VETERAN'S SPOUSE OR WIDOW MEDICAL CONDITION-RELATED DOCUMENTATION - Copies of 6-12 month's medical records that support widow's diagnoses and need for assistance with his/her Activities of Daily Living

NET WORTH DOCUMENTATION - Written breakdown of all assets owned by Veteran or widow OR Veteran and current spouse, Copies of statements or other verification that proves the ownership and current market value of all owned assets

INCOME DOCUMENTATION - Social Security Award Letter(s), Annual Veterans Pension statement, Most recent monthly Retirement Pension Stub(s), Most recent annuity statement(s), Interest / Royalty / Dividend statements, plus any other documentation regarding any income the Veteran, Spouse, or Widow expects to receive in the next 12 months, Last five (5) years federal tax returns, schedules, and 1099 forms

MEDICAL INSURANCE DOCUMENTATION - Medicare, Other health insurance, Long Term Care Insurance policy, Dental, Vision (include cards, claim number, premium amount and frequency)

UNREIMBURSED MEDICAL EXPENSES - Copies of receipts for any unreimbursed medical expenses for the past 12 months (for Veteran and Spouse or Veteran or Widow), Copies of receipts for any unreimbursed transportation costs and/or total miles driven for medical-related purposes

