



## DOCUMENT GATHERING CHEAT SHEET

VA Aid & Attendance Benefit Required Forms

TO APPLY FOR THE AID AND ATTENDANCE PENSION  
YOU WILL NEED ALL OF THE FOLLOWING DOCUMENTS  
PLEASE ROUND UP THE DOCUMENTS BEST YOU CAN AND HOLD UNTIL FURTHER NOTICE!

- **Copy of your DD 214 and/or Separation Papers from the Military** – Available at <http://www.archives.gov/veterans/military-service-records/> Process takes 2-4 weeks.
- **Copy of Marriage Certificate** (Couple or surviving spouse only). Can pay \$50 and get in 2 weeks - [www.vitalcheck.com](http://www.vitalcheck.com). Or the Veteran/Family can go to your local County Court House Office and get it for free in a couple of days.
- **Most recent Personal IRS Tax Return for Veteran and Spouse (Form 1040)** – if filed tax returns in the last 3 years. This is very important as the VA communicates with the IRS and we need to know what income and assets you reported to the IRS.
- **Copy of Veteran's Death Certificate (surviving spouse only)**. Can pay \$50 and get in 2 weeks - [www.vitalcheck.com](http://www.vitalcheck.com). Or the Veteran/Family can go to your local County Court House Office and get it for free in a couple of days. VA requires that the death certificate show a cause of death.
- **Copy of Current Annual Social Security Award letter** (the letter from Social Security sends at the beginning of the year stating what your monthly amount will be for the following year) Call the Social Security Office at 1-800-772-1213 or go online: <https://secure.ssa.gov/apps6z/BEVE/main.html> to get a copy – takes 2 weeks. Or a family member can go to your local Social Security Office and get it the same day.

- ***Copy of Proof of All Income from ALL pensions, retirement, interest income from investments, annuities, etc.*** You can call the financial institutions to get copies if you do not have them.
- ***Copy of the Most Recent Months Bank Statement from ALL bank accounts.***
- ***Net Worth Information: Copy*** of most recent statement for ALL checking and savings accounts, money market, CDs, Trusts, Stocks/Brokerage Accounts, Bonds, Annuities, etc.
- ***Proof of Monthly Medical Expenses including insurance premiums, Medicare premiums, home health costs, facility expenses, caregivers, etc.*** (ONLY IF: they are going to use these medical expenses to discount their income). You will also need to make a copy of a check made out to the home care agency for one month of care if you are using the private pay program. If you are using the Transitional Care Program you will need to get a copy of a check written out to your family member or friend – for one month of care services.
- ***Physician Physical Examination (VA Form 2680 and Form FV12) that includes current diagnosis, medical status, prognosis, ability to care for self, ability to travel unattended, etc.*** Examination form should note all limitations and restrictions, and state if applicant would benefit from living in a “safe and protected environment” and/or “benefit from having the regular aid and attendance of another individual.” Give the Doctors Cover Letter to the Veteran/Surviving Spouse’s local physician (or use your “VA Friendly” Visiting Physicians company to do the assessment in their home) when they go in for their physical examination – this is very important! If this form is not filled out by the Physician correctly we will not be able to submit your client’s application. MAKE SURE A FAMILY MEMBER GOES WITH THEM TO ENSURE THE DOCTOR READS THE COVER LETTER AND FILLS OUT THE TWO FORMS (VA 2680 and FV12) CORRECTLY! These forms MUST BE SIGNED by a Physician (MD or DO). Your Home Care Agency may have access to a “Visiting Physicians” company that can come to your home to perform the assessment!
- ***Fiduciary Appointment if the Doctor puts “no” on question #27 or mentions dementia/Alzheimer’s anywhere on VA Form 2680*** – the VA may (at the time the award is given) want to assign a Fiduciary to handle the financial affairs of the applicant. If you wish, you can let the Doctor know that your answer to question #27 is “Yes” because you already have a family member helping with the financial affairs and therefore don’t need a court to appoint a fiduciary.

If the VA does determine they still need to have the court appoint a fiduciary then we recommend that a family member “opt in” to be chosen as that court appointed fiduciary – instead of the court appointing their own person. So, you would need to determine which family member will provide this role. The VA will request the person’s name in a few months. The person will need to have decent credit, not have a criminal record (felony), and never filed for bankruptcy.