

## **HOW TO APPLY FOR AID & ATTENDANCE IMPROVED PENSION**

VA's pension program provides monthly benefit payments to certain wartime Veterans with financial need, and their survivors. The below list of documents are needed to file a claim for Aid & Attendance Improved Pension. This may seem like a daunting task, but we are submitting a complete claim and having all of this information will speed up the application process.

### **Eligibility Requirements:**

- Veteran was discharged from service with a discharge that was **NOT** dishonorable
- **AND** Served 90 days or more of **ACTIVE** military service with at least **1 day during a period of war** *(Veterans who entered AD after 9/7/80, must also have served at least 24 months of AD service. If the total length of service is less than 24 months, the Veteran must have completed his/her entire tour of AD.)*
- **AND** his/her countable income is below the maximum annual pension rate
- **AND** meets net worth limitations currently set at **\$130,773**
- **AND** is age 65 or older
  - o **OR** is shown by evidence to have a permanent and total non-service connected disability
  - o **OR** is a patient in a nursing home
  - o **OR** is receiving Social Security disability benefits
- **AND** requires the aid of another person in order to perform activities of daily living (ADL), such as bathing, feeding, dressing, toileting, adjusting prosthetic devices, or protecting yourself from hazards of your daily environment
  - o **OR** are bedridden, in that your disability or disabilities require that you remain in bed apart from any prescribed course of convalescence or treatment
  - o **OR** are a patient in a nursing home due to mental or physical incapacity
  - o **OR** has corrected visual acuity of 5/200 or less, in both eyes, or concentric contraction of the visual field to 5 degrees less

**To apply for Aid & Attendance Improved Pension, please prepare the following documents needed to support your claim:**

- Discharge/Separation papers (DD214 if separated after 1950, WD AGO if separated before 1950, NAVPERS if separated before 1950)
- Copy of Marriage Certificate and ALL martial information (VA Form 21-686c)
- Copy of Death Certificate (surviving spouse only)
- Copy of **CURRENT** Social Security Award Letter (the letter that social security sends at the end of the year stating what your monthly amount will be for the upcoming year)
- Net worth information. Include checking, savings, CDs, trusts, stocks, bonds, annuities IRA etc. (VA Form 21P-0969)
- **PROOF** of **ALL** income. Include pensions, retirements, interest, dividends, social security, etc.
- **PROOF** of health insurance premiums
- If you are a court-appointed guardian of the veteran or surviving spouse, a certified copy of the court order of the appointment is required. **VA DOES NOT ACCEPT POWER OF ATTORNEY.**
- List of recurring out of pocket monthly/annual Medical Expenses to include spouse's expenses (VA Form 527EZ / 534EZ section X)
- **Completed Forms**
  - o VA Form 21-2680 for Aid & Attendance Care. Physician statement that includes current diagnosis, medical status, prognosis, ability to care for oneself, ability to travel, medication management, etc.
  - o **AND** VA Form 21-0779 for Assisted Living / Nursing Home Care. Veteran or surviving spouse that is in a nursing home or assisted living facility needs proof of out-of-pocket expenses to the facility
- Banking information for direct deposit to include account and routing number (VA WILL NOT MAIL A PAPER CHECK ANYMORE)
- Employment history (not required if over age of 65)

**Once ALL the above information is gathered, it will be used to fill out VA Form 21P-527EZ (for the veteran) or VA Form 21P-534EZ (for the surviving spouse)**