

VETERANS BENEFITS CHECKLIST



47100 Schoenherr Rd., Suite D, Shelby Township, Michigan 48315

VA Accredited Attorneys

Documents needed to assess a VA Benefit Application

- Driver License (Front and Back) If married, for both
- Social Security Card (Front and Back), If married, for both
- Medicare Card (Front and Back), If married, for both
- Health Insurance Card (Front and Back)
- **Original** Military Discharge/Separation Papers (DD-214)
 - * www.archives.gov/veterans/military-service-records/
(click on: mail or fax standard form SF-180 at bottom of page)
- Copy of current Social Security Benefits Letters (Both)
 - * Please Dial 800-772-1213 (1) (3) (6)
- Asset information, including bank account statements, CDs, Trusts, Stocks, Bonds, Annuities (Even if jointly held)
- Proof of Monthly income from pensions, retirement, interest income from investments, annuities, etc.
- Deeds to any Property, titles to any vehicles, boats, ATVs
- Life Insurance Contracts
- Copy of existing estate plan, including Trust, POA's, Will
- Proof of insurance premiums, medications, medical bills or any other un-reimbursed medical expenses
- Physician statement that includes current diagnosis, medical status, prognosis, name and address, ability to care for self, ability to live unattended, etc. (We will provide the form for the Physician to you at initial consult)
- If Applicable: Senior Community statement indicating level of care and cost of the services provided/Affidavit (We will provide the forms at the initial consult)
- Voided Check
- Copy of Marriage Certificate and marital information for each marriage. Divorce documents and/or death certs if applicable
- **LONG TERM CARE CONTRACT**
- Previous year tax return

◀ Crisis Planning ▶

◀ Probate Estates ▶

◀ Long Term Care Planning ▶

◀ Veterans Benefits ▶

◀ Medicaid/Nursing Home ▶

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