

## **PENSION AS OF JAN. 1, 2018**

### **IS HE CONSIDERED PERMANENTLY AND TOTALLY DISABLED?**

- ☐ The veteran must be at least one of the following:
  - Age 65 or over
  - Receives Social Security disability benefits
  - A patient in a nursing home

### **DID HE SERVE HONORABLY?**

- ☐ Type of Discharge must be:
  - Honorable or
  - General, under honorable conditions

### **WHEN DID HE SERVE AND HOW LONG?**

- ☐ BEFORE the Gulf War Era must have served a minimum of 90 days active duty, one day of which must be during war time:

|          |                                               |
|----------|-----------------------------------------------|
| WWII     | 12/7/1941 to 12/31/1946                       |
| Korean   | 6/27/1950 to 1/31/1955                        |
| Vietnam  | 2/28/1961 to 8/4/1964 (in country of Vietnam) |
| Vietnam  | 8/5/1964 to 5/7/1975                          |
| Gulf War | 8/2/1990 to Present                           |

- ☐ DURING the Gulf War Era must have served a minimum of 24 months or the full period for which he was called to active duty.

### **WHAT IS THE VETERAN'S CONDITION?**

#### **REGULAR STATUS:**

- ☐ Still able to drive

#### **HOUSEBOUND STATUS:**

- ☐ Does not drive
- ☐ Confined to home and is unable to leave without assistance due to medical or mental condition

#### **AID & ATTENDANCE STATUS:**

- ☐ Needs assistance with activities of daily living because of specific physical or mental impairments
- ☐ In nursing home

## WHAT IS HOUSEHOLD INCOME?

### ☐ Income cannot be over:

|                      |                  |                                       |
|----------------------|------------------|---------------------------------------|
| Single veteran:      | REGULAR          | \$13,166/year or \$1097.00 per month  |
|                      | HOUSEBOUND       | \$16,089/year or \$1340.00 per month  |
|                      | AID & ATTENDANCE | \$21,962/year or \$1830.00 per month  |
| Veteran with spouse: | REGULAR          | \$17,241/year or \$1436.00 per month  |
|                      | HOUSEBOUND       | \$20,166/ year or \$1680.00 per month |
|                      | AID & ATTENDANCE | \$26,036/year or \$2169.00 per month  |

### ☐ Deduct:

- ☐ Medicare
- ☐ Supplemental Health Insurance
- ☐ In Home Care Service, Assisted Living Expenses, Nursing Home Expenses (Aid & Attendance Status)

## WHAT IS THE HOUSEHOLD NET WORTH?

Net worth includes: Household/personal property other than home

### ☐ Net worth cannot be over: \$80,000

\* Expected income over next 12 months (gas leases, etc)

### **Things to Bring (Regular Status Only):**

1. Original or Certified Copy of veteran's DD 214
2. Source and amount of all income for the past 12 months.
3. Documentation of all paid unreimbursed medical expenses
4. If married or widow: Original or good copy of marriage license
5. If divorced: divorce decree
6. If there are dependents: birth certificates of children.
7. Date of marriage, Spouse's birth date and social security number.
8. Banking Information (Routing and Checking Number).

### **Forms to Complete for Non Service Pension (Done at appointment):**

- ☐ 21-22 Appointment of Veterans Service Organization as Claimant's Rep
- ☐ 21-4138 Statement in Support of claim
- ☐ DD214
- ☐ Marriage certificate and birth certificates of children, if applicable
- ☐ Death certificate (if applicable)
- ☐ 21-527EZ Application for pension
- ☐ 21-2680 Exam for housebound status (completed by doctor)
- ☐ Letter from nursing home, if applicable
- ☐ 21-686c Spouse's SS # Dec. of status of dependent