

## HOW TO APPLY FOR THE AID & ATTENDANCE SPECIAL PENSION

There is much information that needs to be gathered and prepared when applying for the Aid & Attendance Special Pension. We have compiled a list of the documents you will need, as well as links to download some of the VA and Government Forms that you will need. While it may seem to be a daunting task, we recommend that you read through this site to better your understanding of the application process to be prepared before you speak with any Veterans' Affairs Office.

To apply for the Aid & Attendance Special Pension, you will need the following documents. Prepare these before making your filing.

\*In order to qualify, your monthly expenses for care must exceed monthly income. Assets cannot exceed \$45,000. Veteran may qualify with assets over this amount by repositioning assets into irrevocable Trust.

- Discharge/Separation Papers (DD-214). If you need to request military records, you can either fill out **Standard Form 180** or, you can visit <http://www.archives.gov/st-louis/military-personnel/standard-form-180.html>. Full instructions on how to request military records is listed on that site.
- Copy of Marriage Certificate and all marital information (surviving spouses only).
- Copy of the Death Certificate (surviving spouses only).
- Copy of current Social Security Award Letter (the letter that Social Security send at the beginning of the year stating what your monthly amount will be for the following year).
- Net Worth information, including bank accounts, CDs, Trusts, Stocks, Bonds, Annuities, etc.
- Proof of all income from pensions, retirement, interest income from investments, annuities, etc.
- 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.
- Proof of insurance premiums, medications, medical bills or any other medical expenses that are not reimbursed by insurance, Medicare, or Medicaid.
- Physician statement (VA FORM 21-2680) that includes current diagnosis, medical status, prognosis, name and address, ability to care for self, ability to travel unattended, etc. If you are a veteran in a nursing home, or a family member of a veteran in a nursing home, you can use this form as a certification of that status:
- Banking information for Direct Deposit of A&A monthly payments (include a voided check).
- Employment history (does not apply if you are over 65).
- List of all doctors and hospitals visited in the last year.

Railroad Canyon Financial Services  
Dennis A. Korte, MBA, CFP, LUTCF  
877-249-8068