

Aid and Attendance Worksheet

Veteran Information:

SS#: _____

Veteran's Name: _____ Date of Death: (if applicable) _____

Spouse or Widow Information:

Name: _____ SS#: _____ DOB: _____

Contact Information of Person Assisting with Application:

Name: _____ Phone: _____

Email: _____

Contact information for all VA correspondence – Mail & Phone:

Address: _____ Phone: _____

Veteran: # of times married, including current: _____

Date of Marriage	City, State	Married to Whom	Ceremonial or Common Law	Date Ended	City, State	How it ended

Spouse: # of times married, including current: _____

Date of Marriage	City, State	Married to Whom	Ceremonial or Common Law	Date Ended	City, State	How it ended

Are there any total or permanently disabled dependent children before age 18? _____ (Provide Documentation if yes)

Name of Bank for VA Direct Deposit _____

Account Number _____ Routing Number _____

Important: Information from the IRS or SSA that conflicts with the income reported may delay your claim and/or reduce your benefit amount

Income Source	Veteran Amount	Spouse Amount
Social Security (Gross before deduction)		
Work Pensions – Where?		
Military Retirement		
Veterans Affairs Compensation or Pension		
Long Term Care Insurance Reimbursement		
Rental Property Income		
Farm Income		
US Civil Service		
US Railroad Retirement		
Black Lung		

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Defined as fair market value of all property that an individual owns, property (excluding the value of your or your dependent's primary residence including the residential lot area, not to exceed 2 acres) less the amount of mortgages Personal property means the value of personal effects that are in excess of being suitable and consistent with a reasonable mode of life.

Assets	Veteran Amount	Spouse Amount
Cash/Non-Interest Bearing Bank Accounts		
Interest-Bearing Bank Accounts		
IRA's Keogh Plans, etc.		
Stocks, Bonds, Mutual Funds, Annuity		
Interest Income Dividends (1099's) Last 12 Months		
Expected Income Next 12 Months Expected Source?		

Please answer the following questions and provide documentation for questions answered yes:

1. Are you or your dependents receiving or expecting to receive any income in the next 12 months including but not limited to distributions from retirement plan such as: Military retirement, civil service retirement, IRA, SEP, Qualified plans, Pensions, Annuities, black lung? Yes or No
2. Are you or your dependents receiving or expecting to receive unemployment income in the next 12 months?
 Yes or No
3. Do you or your dependents own a savings bond or receive or expect to receive interest from a savings bond within the next 12 months? Yes or No
4. Are you or your dependents receiving or expecting to receive income from rental property farm or business within the next 12 months? Yes or No
5. Are you or your dependents receiving or expecting to receive interest, dividends, or royalties within the next 12 months?
 Yes or No
6. Are you or your dependents receiving wages or expecting to receive wages within the next 12 months?
 Yes or No
7. Did you or your dependents receive income LAST YEAR that is no longer being received or was a one-time payment?
 Yes or No
8. Do you or your dependents have assets NOT already reported, such as non-interest bearing accounts, cash, stocks, bonds, or real estate? Yes or No
9. In the current year and/or prior three tax years did you or your dependents sell, convey, trade, or give away assets?
 Yes or No
10. In the current year or the prior three tax years, did you or your dependents transfer any assets to a trust or purchase an annuity? Yes or No
 - What was the Market value of the asset at the time of transfer or annuity purchase? _____
 - What was the date the asset was transferred? _____
 - Did you purchase an annuity with the assets? Yes or No - Provide date of purchase and provide name of person that asset was purchased from. (first, middle, last)
 - Provide type of annuity purchased (give details and attach documentation)
 - Were assets used to establish a trust? Yes or No - If yes, provide tax number details and documentation.
 - Was the trust established for a child of the veteran who was incapable of self-support prior to age 18? Yes or No
11. Did you or your dependents waive or expect to waive any receipt of income in the next 12 months?
 Yes or No