



VETERANS BENEFITS

WHAT SHOULD I BRING TO MY FIRST APPOINTMENT?

PLEASE PROVIDE WRITTEN VERIFICATION OF ANY OF THE FOLLOWING ITEMS THAT
APPLY TO YOU AND YOUR SPOUSE

Drivers License	_____		
Birth Certificate	_____		
Death Certificate (if applicable)	_____		
Medicare Card	_____		
Health Insurance Card (front and back)	_____		
Bill for Health Insurance	_____		
Social Security Card	_____		
Trust Agreements	_____		
Power of Attorney	_____		
Name of Skilled Nursing Center	_____		
Cash in Patient Trust Account	_____		
Checking Account Balances	_____	_____	_____
Savings Account Balances	_____	_____	_____
Certificates of Deposit Values	_____	_____	_____
IRA/401K Values	_____	_____	_____
Stock Certificate Values	_____	_____	_____
US Bond Values	_____	_____	_____

Annuity Contract Values
(Bring all contracts) _____

Business Interest Values _____

Real Estate – Residence _____
(Bring deed, tax notice, mortgage, land contract, rental agreements, etc.)

Real Estate – Other _____
(Bring deed, tax notice, mortgage, land contract, rental agreements, etc.)

Utility Bills _____

Vehicles
(car/truck/boat/atv, etc.) _____

Life Insurance Policies
(face value and cash value) _____

Funeral Plans _____

Burial Plots _____

Income Tax Return for years _____

Income Information

 Social security _____

 Pension _____

 Other _____

DD-214 (Discharge papers) _____

Please bring proof of past 12 months of all medical bills, prescription bills, long term care bills, home health care bills, assisting living bills, nursing home bills, etc.

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