

JB JORDAN
BALKEMA
ELDER LAW CENTER

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 TO YOUR SPOUSE

Drivers License _____

Birth Certificate _____

Death Certificate of _____

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 _____

IRA/401K _____

Stock Certificates _____

US Bonds _____

Brokerage Accounts _____

Annuity Contracts _____

Business Interest _____

Real Estate – Residence _____

(deed, tax notice, mortgage, land contract, rental agreements etc)

Real Estate – Other _____

(deed, tax notice, mortgage, land contract, rental agreements, etc.)

Utility Bills _____

Vehicles

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

Life Insurance Policies

(face value & cash value) _____

Funeral Plan _____

Burial Plots _____

Income Tax Return _____

Income Information

Social Security _____

Pension _____

Other _____

DD-214 _____

Honorable Discharge _____

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