

## Items/Documents needed for a VA Aid and Attendance Claim

From the VA's perspective, Aid and Attendance is **FIRST a medical necessity** and then **SECONDLY, a needs-based benefit**. The claimant must prove that the on-going monthly medical expenses meet or exceed the claimant's total monthly income.

### Required VA Forms

- VA Form 21-22 (VA Representative and VA Power of Attorney)
- VA Form 21-4138 (a listing of all the enclosed documentation)
- VA Form 21P-527EZ (Non-Service-Connected Pension for a War Time Veteran)
- Or ...**
- VA Form 21P534EZ (Spousal/Widow Benefits including Aid and Attendance)
- VA Form 21-2680 (Certification of Medical Necessity)
- VA Form 21P-8416 (Medical Expense Report)
- VA Form 21-686c (if claimant is married with dependents)
- VA Form 21P-0969 (Income and Asset Statement) **NOT ALWAYS REQUIRED**
- VA Form 21-0779 (Nursing Home Information for an A&A Claimant)
- VA Form 5565 (Financial Status Report) (you will have to type the report name in the Keywords block)

### Veteran Personal Info

- Veteran's Honorable Discharge
- VA letter confirming VA Disability Rating (the July 1 letter is sufficient)
- Marriage Certificate (if applying for a spouse or widow)
- Veteran's Death Certificate (if applying for a widow)
- Real Estate Property Card (Assessor's office if property is greater than 2 acres)

### Income and Asset Documentation

- Letter from Assisted Living Facility ("Worksheet for Assisted Living") (21P-527EZ or 21P-534EZ)
- Two recent checking account statements (consecutive months)
- Two recent savings account statements (consecutive months)
- A recent Pension / Annuity / Retirement account statement
- A recent IRA / 401k statement (including any Required Minimum Distribution statement)
- The annual (December) Social Security Statement (same as needed for Chapter 115)
- A current Brokerage Statement (Stocks, Bonds, Mutual Funds, etc.)
- A copy of a Real Estate Trust document, if applicable
- Long Term Care Insurance Statement
- Reverse mortgage statement (unused portion is treated as an asset)
- Medical Expense Evidence
  - PAID assisted living invoices
  - PAID home health care / care giver invoices
  - PAID medical care visits, disposables, pharma, glasses, dental, appliances, etc.