



**COUNTY OF SAN LUIS OBISPO**

**VETERANS SERVICES OFFICE**

**Morgan Q. Boyd** *Veterans Services Officer*

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**Pension Checklist**

**Documents:**

- DD214 or Report of Separation

**Dependent Information:**

- Marriage Certificate
- Death Certificate
- Divorce Decrees
- Prior Marriage info (veteran and spouse)
- Birth Cert for dependent children (< 18, 18-23 if in school, or helpless child)
- Dependent information (full name, social security numbers, date of birth)

**Income:**

- Proof of Gross income from all sources (statement copy preferred)
- Proof of assets (Copies of most recent statements)
- Annuity contract and statement as to surrender value as applicable
- Complete copy of Trust with itemization showing values
- Direct Deposit info: routing/account/bank name/address/phone #

**Medical:**

- VA form 21-2680 Examination for HB/A&A
- Medical Expenses (insurance premiums, in home care expenses, assisted living expenses, nursing home expenses)
- Death expenses