

**EXHIBIT "A"**  
**PLANNING FOR VETERAN BENEFITS**

**PLEASE BRING THE FOLLOWING DOCUMENTS TO YOUR APPOINTMENT AND WE WILL COPY THEM:**

**BACKGROUND INFORMATION:**

1. Social Security card for veteran and spouse if married.
2. Photo identification for veteran and spouse if married.
3. Birth certificate or other proof of citizenship for veteran and spouse if married.
4. Marriage license.
5. Death certificate for the veteran.
6. Honorable discharge papers.

**GOVERNMENT BENEFITS:**

7. Letter from Social Security stating gross monthly social security benefits (retirement; SSI; SSDI) for the veteran as well as for the spouse. You can obtain this information by calling social security at (800) 772-1213 and requesting same be mailed to you at home or, you can go to a local office and it will be printed while you are there.
8. Letter from the Department of Children & Families (DCF) stating the type of public assistance the veteran or the spouse is currently receiving (Medicaid; Food Stamps). Medicaid card if you are currently a recipient of Medicaid benefits.
9. Written proof that the veteran has been determined to be disabled by either the Social Security Administration or, the Veteran's Administration.

**INFORMATION RELATING TO HEALTH EXPENSES:**

10. Copies of invoices and canceled checks showing payment made for medical expenses that are not reimbursed by your insurance (i.e. prescriptions; dentist, eye glasses; co-payments; premiums for health insurance; funeral payments; transportation to doctors; private duty aide).
11. Name, address, phone number of the physician who is treating the veteran and who has diagnosed a medical condition.
12. Copy of contract with an Assisted Living Facility or Skilled Nursing Facility.

**ASSET & INCOME DOCUMENTATION:**

13. Deed and tax bill for home and any other property owned.

14. Copies of last six months bank statements for all bank accounts, IRA's and Certificate of Deposit
15. All Life Insurance policies.
16. Car title, vehicle registration and insurance policy.
17. Copies of last six stock statements from brokerage house or copy of stock certificates.
18. Copy of irrevocable burial contract with funeral home if you have one, or other burial contract.
19. If there is a pension, please call the Company to send written documentation as to the gross amount of the pension.
20. Copy of current Last Will & Testament, Trust, Power of Attorney, Living Will, Designation of Health Care Surrogate.
21. Any other documentation evidencing any asset owned.

(Revised 03/20/06)