

GENERAL INSTRUCTIONS FOR INCOME- NET WORTH AND EMPLOYMENT STATEMENT

NOTE: Read these instructions very carefully, detach, and keep for your reference.

Frequently Asked Questions

How can I contact VA if I have a question?

If you have questions about this form, how to complete it, or about benefits, contact your nearest VA regional office. You can locate the address of the nearest VA regional office on the Internet at <u>www.va.gov/directory</u>, in your telephone book blue pages under "United States Government, Veterans." For information you may also call 1-877-294-6380 (Hearing Impaired TDD line 1-800-829-4833). You may also contact VA by the Internet at: <u>https://iris.va.gov</u>.

When do I use VA Form 21-527?

Use VA Form 21-527 to apply for disability pension if you *have* previously filed a claim for compensation and/or pension. If you *have not* filed a claim for compensation or pension previously, you must use VA Form 21-526, Veteran's Application for Compensation and/or Pension. For expeditious processing, use VA Form 21-527EZ, Fully Developed Claim (Pension). All VA forms are available at <u>www.va.gov/vaforms</u>.

What is disability pension and how does VA decide what I will and will not receive?

You should apply for pension benefits if *all* of the following are true:

- Your income is limited
- You are age 65 or older or are permanently and totally disabled (not as a result of your military service)
- You had at least 90 days active duty during a wartime period

VA pays disability pension based on the amount of income that the veteran and family receive, taking into account the number of dependents in the family. VA must include all sources of income that Federal law specifies. You can find out what the current income limitations and rates of benefits are by contacting your nearest VA office.

VA may pay benefits from the date of receipt of your application unless disability prevented you from filing a claim for a period of at least 30 days. If you want this claim considered for retroactive payment, indicate so in Item 37, "Remarks," and identify the specific disability which prevented you from filing.

What is special monthly pension?

VA may pay a higher rate of disability pension to a veteran who is blind, a patient in a nursing home, otherwise needs regular aid and attendance, or who is permanently confined to his or her home because of a disability. If you wish to apply for this benefit, check "Yes" in Item 22A.

What medical evidence should I submit?

If you are age 65 or older or determined to be disabled by the Social Security Administration, you do not have to submit medical evidence with your application unless you are claiming special monthly pension. Otherwise, provide medical records that are related to the disabilities that prevent you from working.

If you wish to claim special monthly pension and are not in a nursing home, furnish a statement from your doctor showing the extent of your disabilities. If you are in a nursing home, attach a statement, or VA Form 21-0779, Request for Nursing Home Information in Connection with Claim for Aid and Attendance, signed by an official of the nursing home showing the date you were admitted to the nursing home, the level of care you receive, and whether Medicaid covers all or part of your nursing home costs.

If you want VA's help getting medical records related to this claim you may complete VA Form 21-4142, Authorization and Consent to Release Information to the Department of Veterans Affairs (VA). By signing VA Form 21-4142, you authorize any doctors, hospitals, or caregivers that have treated you to release information about your treatment to VA. You do not need to complete this form for any treatment you received at a VA facility. If you need a copy of the form, you may contact VA as shown in "How can I contact VA if I have a question?", or download the form from the VA website <u>www.va.gov/vaforms</u>.

GENERAL INSTRUCTIONS (Continued)

What do I do when I have completed my application?

When you have completed this application mail it or take it to a VA regional office. You can locate the mailing address of your nearest VA regional office at <u>www.va.gov/directory</u>. Be sure to attach any materials that support and explain your claim. Also, make a photocopy of your application and everything that you submit to VA before you mail it.

How can I assign someone to act as my representative?

An accredited representative of a veteran's organization or other service organization recognized by the Secretary of Veterans Affairs may represent you without charge. An accredited attorney or agent may also represent you. However under 38 U.S.C. 5904(c), an accredited agent or attorney may only charge you for services performed after the date you file a notice of disagreement.

If you want to use a representative to help you with your application, contact the nearest VA office. Depending on the type of representative you want to designate, we will send you one of the following forms:

- VA Form 21-22, Appointment of Veterans Service Organization as Claimant's Representative or
- VA Form 21-22A, Appointment of Individual as Claimant's Representative

These forms are also available at: <u>www.va.gov/vaforms</u>. If you have already designated a representative, no further action is required on your part.

Net Worth

VA considers all of your (and your spouse's) assets ("net worth") in determining your eligibility for non service-connected pension. Transferring your cash or property to another person, trust, organization, corporation or any other entity does not reduce your net worth in order to qualify for pension unless it is clear that you have permanently given up all rights of ownership, including the right to control the cash or property. In completing this form, you must tell us about *all* assets you have transferred in the last two (2) years, along with any assets you transferred previously for *any* period of time if the value of the asset(s) exceeded a total of \$20,000. Note the conditions of transfer in Item 36, "Remarks," including any remaining right, privilege of ownership, benefit, or control you have over the asset.

PRIVACY ACT INFORMATION: The form will be used to determine allowance to pension benefits (38 U.S.C. 5101). The responses you submit are considered confidential (38 U.S.C. 5701). VA may disclose the information that you provide, including Social Security numbers, outside VA if the disclosure is authorized under the Privacy Act, including the routine uses identified in the VA system of records, 58VA21/22/28, Compensation, Pension, Education, and Vocational Rehabilitation and Employment Records - VA, published in the Federal Register. The requested information is considered relevant and necessary to determine maximum benefits under the law. Information submitted is subject to verification through computer matching programs with other agencies. VA may make a "routine use" disclosure for: civil or criminal law enforcement, congressional communications, epidemiological or research studies, the collection of money owed to the United States, litigation in which the United States is a party or has an interest, the administration of VA programs and delivery of VA benefits, verification of identity and status, and personnel administration. Your obligation to respond is required in order to obtain or retain benefits. Information that you furnish may be utilized in computer matching programs with other Federal or state agencies for the purpose of determining your eligibility to receive VA benefits, as well as to collect any amount owed to the United States by virtue of your participation in any benefit program administered by the Department of Veterans Affairs. Social Security information: You are required to provide the Social Security number requested under 38 U.S.C. 5101(c)(1). VA may disclose Social Security numbers as authorized under the Privacy Act, and, specifically may disclose them for purposes stated above.

RESPONDENT BURDEN: We need this information to determine your eligibility for pension. Title 38, United States Code, allows us to ask for this information. We estimate that you will need an average of 1 hour to review the instructions, find the information, and complete this form. VA cannot conduct or sponsor a collection of information, unless a valid OMB Control Number is displayed. You are not required to respond to a collection of information if this number is not displayed. Valid OMB control numbers can be located on the OMB Internet Page at www.reginfo.gov/public/do/PRAMain. If desired, you can call 1-800-827-1000 to get information on where to send comments or suggestions about this form.

Departr	Department of Veterans Affairs INCOME, NET WORTH, AND EMPLOYMENT STATEMENT							
IMPORTANT - Read Privacy Act and Respondent Burden Information and Instructions carefully before completing the form. Type, print, or write plainly.							RITE IN THIS SPACE) DATE STAMP)	
1. FIRST NAME - MID	PART I - VETI DDLE NAME - LAST NAME OF				ON		_	
2A. VETERAN/CLAIMANT SOCIAL SECURITY NO. 2B. VA FILE NO.								
		20.	WITHEL NO.					
3. ADDRESS OF VET	ERAN/CLAIMANT (Number, s	street or rural rot	ıte, City or P.O., Sı	tate and .	ZIP Code)			
DAYTIME	4A. TELEPHONE NU	MBER(S) (Includ	e Area Code) CELL			4B. E-MAIL A	ADDRESS (If applica	ble)
			II - MARITA		ORMATION			
5. WHAT IS YOUR M	l, you should provide a o ARITAL STATUS?	copy of your m	arriage certifica	ate.	Af you are divo	rced or wido	wed skip to Item 14)	
MARRIED		ORCED	NEVER MARRIED		(If never marrie		1 /	
6A. WHEN WERE YO	U MARRIED? (Month, day, y	ear)	6B. WHER	e did yo	DU GET MARRIEI	D? (City, Sta	te or Country)	
7. SPOUSE'S NAME	(First, middle, last)		8. SPOUSI	E'S BIRT	HDAY (Month, da	iy, year)	9. SPOUSE'S SOCIA	L SECURITY NO.
10A. IS YOUR SPOU	SE ALSO A VETERAN?	10	B. SPOUSE'S VA F	ILE NO.	(If any)		11. DO YOU LIVE W	ITH YOUR SPOUSE?
							(If "Yes," skip to Item 14) (If "No," complete Items 12, 13A & 13B)	
12. SPOUSE'S ADDR and ZIP Code)	ESS (Number and street or r	ural route, city of	• P.O., State	S	YOU DO NOT LI POUSE PLEASE I e., illness, work,	PROVIDE TH	OUR 13B. H	OW MUCH DO YOU DNTRIBUTE MONTHLY D SPOUSE'S SUPPORT?
							\$	
	INFORMATIC	N ABOUT TH	IE VETERAN'S	& SPC	USE'S PREV	IOUS MAI		
	e following information at sheet of paper providing					arriages. If	you need addition	nal space please
14. HOW MANY TIME	ES HAVE YOU BEEN MARRIE	D?						
15A. DATE OF MARRIAGE (Month, Day, Year)	15B. PLACE OF MARRIAGE (City, State or Country)		15C. NAME OF FORMER SPOUSE (First, Middle, Last)		15D. DATE MARRIAGE EN (Month, Day, Y	DED M	15E. PLACE ARRIAGE ENDED y, State or Country)	15F. REASON MARRIAGE ENDED (Death, Divorce)
16. HOW MANY TIME	S HAS YOUR CURRENT SP	OUSE BEEN MAF	RRIED?		·	·		
17A. DATE OF MARRIAGE (Month, Day, Year)	17B. PLACE OF MARRIAGE (City, State or Country)	-	OF FORMER SPO (<i>t, Middle, Last)</i>	USE	17D. DATE MARRIAGE EN (Month, Day, Y	DED M	17E. PLACE ARRIAGE ENDED y, State or Country)	17F. REASON MARRIAGE ENDED (Death, Divorce)

PART III - INFORMATION ABOUT YOUR UNMARRIED DEPENDENT CHILDREN

VA recognizes your biological children, adopted children, and stepchildren as dependents. These children must be unmarried and: • under age 18, or

 between 18 and 23 and 	pursuing an approved	course of education, or

• of any age if they became seriously disabled and permanently unable to support themselves before reaching age 18.

"Seriously disabled" means that the child became permanently unable to support himself/herself before reaching age 18. Furnish a statement from an attending physician or other medical evidence which shows the nature and extent of the physical or mental impairment. If you need additional space, please attach a separate sheet of paper providing the requested information about each child.

Note: You should provide a copy of the public record of birth for each child or a copy of the court record of adoption for each adopted child.

	INFORMATION ABOUT THE CHILDREN WHO LIVE WITH YOU									
18. DO YOU HAVE ANY DEPE		?								
YES NO (If "No	o," skip to Part IV)					19E CH		PPLICABLE C	ATEGORY	
19A. NAME OF CHILD (First, Middle, Last)	19B. DATE OF BIRTH (Mo., Day, Yr.)	19C. PLACE OF BIRTH (City, State or Country)	19D. SOCIAL SECURITY NUMBER	BIOLOGI	CAL		STEPCHILD	18-23 YRS. OLD AND ATTENDING SCHOOL	SERIOUSLY DISABLED	CHILD PREVIOUSLY MARRIED
						NOTIN				
		ATION ABOL	IT THE CHILDRE	N WHO	00	NOT LIV		0		
20A. NAME OF C (First, Middle, L		CC	20B. CHILD'S DMPLETE ADDRESS		20C. NAME OF PERSON CHILD LIVES WITH (If applicable) 20D. MONTHLY AMOUNT YOU CONTRIBUTE TO CHILD'S SUPPORT \$ \$					
									\$	
									\$	
									\$	
									\$	
	PA	ART IV - INF	ORMATION A	BOUT Y	10	JR DISAI	BILITY		T	
21A. WHAT DIS	SABILITY (IES) PRE	VENT YOU FRO	M WORKING?		21	B. WHEN D	ID THE DISA	BILITY(IES) BE	GIN? (Month,	Day, Year)
22A. ARE YOU CLAIMING A SI THE REGULAR ASSISTA PROBLEMS, OR ARE HO	NCE OF ANOTHER	PENSION BECA PERSON, HAVE	USE YOU NEED E SEVERE VISUAL	GI	IVEN OSPI	I OUTPATIE	NT OR HOME N, OUTPATIE		S PERTAINS C	ALIZED OR NLY TO DUE TO THE
				ES ES		TED IN ITEM : (If "Yes," co	omplete Items	23A & 23B)		
23A. DATE(S)	OF RECENT HOSP	ITALIZATION OF	R CARE		23B. NAME AND MAILING ADDRESS OF FACILITY OR DOCTOR					
24A. ARE YOU NOW EMPLOYED?				24B. W	'HEN	I DID YOU L	AST WORK?	(Month, Day,	Year)	
	," answer Item 24B	,		045.11						
24C. WERE YOU SELF-EMPLO YES NO $(If''Ye$	s," answer Items 24		LI DIOARTED'	24D. W	v⊓Al		VORK DID YC	יטע טי		
24E. ARE YOU STILL SELF-EN	IPLOYED?			24F. W	VHA	r kind of v	VORK DO YO	U DO NOW?		
YES NO (If "Yes," answer Item 24F)										

PART V - INFOR	MATION ABOUT YOUR	EMPLOYMENT	AND EDUCATI	ON (Continued)			
NOTE : In the table below, tell us about to the present.							
25A. WHAT WAS THE NAME AND ADDRESS OF YOUR MOST RECENT EMPLOY	25B. WHAT WAS YOUR /ER? JOB TITLE?	25C. WHEN DID YOUR WORK BEGIN? (Mo., day, year)	25D. WHEN DID YOUR WORK END? (Mo., day, year)		25F. WHAT WERE YOUR TOTAL ANNUAL EARNINGS?		
					\$		
					\$		
					\$		
					\$		
					\$		
					\$		
26A. CHECK THE HIGHEST YEAR OF EDUCA	TION YOU COMPLETED:						
Grade school:							
	5 6 7 8	9 10	11 12				
College:							
	Over 4						
26B. LIST THE OTHER TRAINING OR EXPERI	ΕΝCΕ ΥΩΗ ΗΔ\/Ε ΔΝΟ ΔΝΥ CERT	IFICATES THAT YOU	HOLD				
			HOLD				
	PART VI - NURSIN	G HOME INFOR	MATION				
NOTE : Provide a statement by an official of the nursing home that tells VA that you are a patient in the nursing home because of a physical or mental disability and tells us the amount you pay out-of-pocket for your care.							
27A. ARE YOU NOW IN A NURSING HOME?		27B. WHAT IS T FACILITY?		PLETE MAILING ADDF	RESS OF THE		
YES NO (If "Yes," answer	-						
27C. DOES MEDICAID COVER ALL OR PART	OF YOUR NURSING HOME COST	S? 27D. HAVE YOU	J APPLIED FOR MEDIC	CAID?			
YES NO (If "No," answer	Item 27D)	YES [NO				

PART VI - INFORMATION ABOUT THE NET WORTH OF YOU AND YOUR DEPENDENTS

NOTE: VA must generally consider all assets in determining eligibility for non-service connected pension. VA cannot pay you pension if your net worth is substantial. Net worth is the market value of all interest and rights you have in any kind of property less any mortgages or other claims against the property. However, net worth does not include the house you live in or a reasonable area of land it sits on. Net worth also does not include the value of personal things you use everyday like your vehicle, clothing, and furniture. VA does not allow anyone to transfer cash, property, or any other asset in order to qualify for non-service connected pension. If property is owned jointly by yourself and your spouse, report one-half of the total Value Held jointly for each of you. You must report net worth for yourself and all persons for whom you are claiming benefits. You do not reduce net worth for VA purposes as long as you maintain some right, privilege of ownership, benefit, or control of asset.

For Items 28A through 28F, provide the amounts. If none, write "0" or "None."

			CHILD(REN)					
		000100	Name (First, middle, last)	Name (First, middle, last)	Name (First, middle, last)	Name (First, middle, last)		
SOURCE OF ASSETS	VETERAN	SPOUSE	(1 11 51, 111 1110, 1115)	(1 1131, 1114110, 1431)	(1 11 51, 111 aute, 1431)	(1 1131, 1114110, 1431)		
28A. Cash, bank accounts,	\$	\$	\$	\$	\$	\$		
certificates of deposit (CDs)	Interest bearing: y n	Interest y n bearing:	Interest y n bearing:	Interest y n	Interest y n bearing:	Interest y n		
200 IDAs Kaash Dians ats								
28B. IRAs, Keogh Plans, etc.	Interest bearing: y n	Interest bearing: y n	Interest bearing: y n	Interest bearing: y n	Interest bearing: y n	Interest bearing: y n		
28C. Stocks, bonds, mutual funds	Interest bearing: y n	Interestyn bearing:	Interestyn bearing:	Interest bearing: y n	Interestyn bearing:	Interest bearing: y n		
	Interest bearing: y n	Interest bearing: y n	Interest bearing: y n	Interest bearing: y n	Interest bearing: y n	Interest bearing: y n		
28E. Real property								
(Not your home)	Interest bearing: y n	Interestyn bearing:	Interest bearing: y n					
28F. All other property	Interest y n bearing:	Interest y n bearing:	Interest bearing: y n	Interest bearing: y n	Interest y n bearing:	Interestyn bearing:		
PART VII - INFORMATION ABOUT THE INCOME OF YOU AND YOUR DEPENDENTS								

IMPORTANT - VA will count payments from *any* source, unless the law says not to count them. Report *all* income and its sources and VA will determine whether to count it.

NOTE: Report the total amounts before you take out deductions for taxes, insurance, etc. Do not report the same information in both tables. If you expect to receive a payment, but you don't know how much it will be, write "Unknown" in the space. If you do not receive any payments from one of the sources that we list, write "0" or "None" in the space. If you are receiving monthly benefits, give us a copy of your most recent award letter. This will help us determine the amount of benefits we should pay you.

29. HAVE YOU CLAIMED OR ARE YOU RECEIVING DISABILITY BENEFITS FROM THE SOCIAL SECURITY ADMINISTRATION (SSA)?

YES		NO
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MONTHLY INCOME - TELL US THE INCOME YOU AND YOUR DEPENDENTS RECEIVE EVERY MONTH						
	CHILD(REN)					
SOURCE OF MONTHLY INCOME	VETERAN	SPOUSE	Name (First, middle, last)	Name (First, middle, last)	Name (First, middle, last)	Name (First, middle, last)
	VETEROUT					
30A. Gross Wages & Salary	\$	\$	\$	\$	\$	\$
30B. Social Security						
30C. U.S. Civil Service						
30D. U.S. Railroad Retirement						
30E. Military Retirement						
30F. Black Lung Benefits						
30G. Supplemental Security Income (SSI)/Public Assistance						
30H. Other income received monthly (Please write source below)						
,						

PART VII - INFO	RMATIO	N ABOUT YO		DEPENDENTS	EXPECTED ANN	IUAL INC	COME ((Continued)
EXPECTED INCOME I								
					CHILI	D(REN)		
SOURCE OF INCOME FOR THE NEXT 12 MONTHS		VETERAN	SPOUSE	Name (First, middle, last)	Name (First, middle, last)	Nar (First, mid		Name (First, middle, last)
31A. Total interest and d	ividends	\$	\$	\$	\$	\$		\$
31B. Worker's compensa unemployment com								
31C. Other income expe (Please write sourc								
						MDUDO		
PART VIII - I	NFORMA	ATION ABOU	T YOUR MEDIC	CAL, LEGAL OF	R OTHER UNREI	MBURSE	ED EXP	PENSES
NOTE : Family medical expenses and certain other expenses you actually paid may be deductible from your income. Show the amount of unreimbursed medical expenses, including the Medicare deduction, you paid over the last year for yourself or relatives who are members of your household. Also, show unreimbursed last illness and burial expenses and educational or vocational rehabilitation expenses you paid. Last illness and burial expenses are unreimbursed amounts you paid for the last illness and burial of a spouse or child at any time prior to the end of the year following the year of death. Educational or vocational rehabilitation expenses are amounts you paid for courses of education including tuition, fees, and materials. Show medical, legal or other expenses you paid because of a disability for which you were awarded civilian disability benefits. When determining your income we may be able to deduct them from the disability benefits for the year in which the expenses are paid. Do not include any expenses for which you were reimbursed. If more space is needed, attach a separate sheet.								
32A. AMOUNT YOU PAID	-	ATE PAID 3 day, year)	2C. PURPOSE (Do charges, attorn		32D. PAID T (Name of doctor, h pharmacy, et	iospital,	REL PERS	DISABILITY OR ATIONSHIP OF SON FOR WHOM PENSES PAID
\$								
\$								
\$								
\$								
		PAF	RT IX - DIRECT	DEPOSIT INFO	RMATION			
If benefits are awarded we will need more information in order to process any payments to you. Please read the paragraph below and then either:								
1. Attach a voided check, or 2. Answer Items 33-35.								
The Department of Treasury requires all Federal benefit payments be made by electronic funds transfer (EFT), also called direct deposit. Please attach a voided personal check or deposit slip or provide the information requested in Items 33, 34 and 35 to enroll in direct deposit. If you do not have a bank account, you must receive your payment through Direct Express Debit MasterCard. To request a Direct Express Debit MasterCard you must apply at www.usdirectexpress.com or by telephone at 1-800-333-1795. If you elect not to enroll, you must contact representatives handling waiver requests for the Department of Treasury at 1-888-224-2950. They will encourage your participation in EFT and address any questions or concerns you may have.								
33. ACCOUNT NUMBER - PLEASE CHECK THE APPROPRIATE BOX AND PROVIDE THE ACCOUNT NUMBER, IF APPLICABLE								
34. NAME OF FINANCIAL IN	NSTITUTION							
35. ROUTING OR TRANSIT NUMBER								

PART X - REMARKS

36. REMARKS - USE THIS SPACE FOR ANY ADDITIONAL STATEMENTS THAT YOU WOULD LIKE TO MAKE CONCERNING YOUR APPLICATION

PART XI - CERTIFICATION AND SIGNATURE

I certify and authorize the release of information: I certify that the statements in this document are true entity, including but not limited to any organization, s Department of Veterans Affairs any information about which makes the information confidential.	service provider, emp	loyer, or government agency, to give the
37. SIGNATURE OF CLAIMANT		38. DATE SIGNED
WITNESSES TO SIGNATURE OF CLAIMANT IF MADE BY "X" N you as you sign. They must then sign the form and print their nam		X" then you must have 2 people you know witness
39A. SIGNATURE AND PRINTED NAME OF WITNESS	39B. ADDRESS OF WITN	ESS
40A. SIGNATURE AND PRINTED NAME OF WITNESS	40B. ADDRESS OF WITN	ESS
PENALTY : The law provides severe penalties which include fin a material fact, knowing it to be false, or for the fraudulent acce	ne or imprisonment, or bo eptance of any payment to	th, for the willful submission of any statement or evidence of which you are not entitled.

VA FORM 21P-527, JUN 2012