

### 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). 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 permanently and totally disabled not necessarily as a result of your military service, or are age 65 or older
- At least part of your active duty was during a wartime period

VA pays disability pension based on the amount of income that the veteran and his/her family receive and 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 severe 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 only those 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, 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 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) or VA Form 21-0779, Request for Nursing Home Information in Connection with Claim for Aid and Attendance. 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 VA Form 21-4142 or VA Form 21-0779, you may contact VA as shown in "How can I contact VA if I have a question?" or download the forms from the VA web site www.va.gov/vaforms.

### 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, for your records, 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

You may download these forms 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. In section VII, Items 29A and 29B, report all transferred assets. Note the conditions of transfer in Item 37, "Remarks," including any remaining right, privilege of ownership, benefit, or control you have over the asset.

**IMPORTANT**: If you are certifying that you are married for the purpose of VA benefits, your marriage must be recognized by the place where you and/or your spouse resided at the time of marriage, or where you and/or your spouse resided when you filed your claim (or a later date when you became eligible for benefits) (38 U.S.C. § 103(c)). Additional guidance on when VA recognizes marriages is available at <u>http://www.va.gov/opa/marriage/</u>.

**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 <a href="https://www.reginfo.gov/public/do/PRAMain">www.reginfo.gov/public/do/PRAMain</a>. If desired, you can call 1-800-827-1000 to get information on where to send comments or suggestions about this form.

Department of Veterans Affairs					INCOME, NET WORTH, AND EMPLOYMENT STATEMENT								
<b>IMPORTANT</b> - Read Privacy Act and Respondent Burc completing the form. Type, print, or write plainly.				den Information and Instructions carefully before						•	(DO NOT WRITE IN THIS SPACE) (VA DATE STAMP)		
PART I - VETERAN/CLAIMANT INFORMATION													
1. FIRST NAME - MIDDLE NAME - LAST NAME OF VETERAN/CLAIMANT (Type or Print)									1				
2A. VETERAN/CLAIMA	ANT SOCIAL SEC	URITY NO.		2B. VA FIL	E NO.								
3. ADDRESS OF VETE	ERAN/CLAIMANT	(Number, st	reet or run	al route, Cit <u></u>	y or P.O., St	ate and Z	IP Code)						
	4A. TELEF	PHONE NUM	IBER(S) (I	nclude Area	Code)			4B. E-N	MAIL AD	DRESS (If ap	plical	ole)	
DAYTIME		EVENING			CELL							,	
			P	PART II -	MARITA	L INFO	RMATION						
NOTE: If married,	you should pr	rovide a c											
5. WHAT IS YOUR MA	RITAL STATUS?		RCED		RMARRIED		(If you are divor (If never married			1	14)		
6A. WHEN WERE YOU	J MARRIED? (Mo	onth, day, ye	ar)		6B. WHER	E DID YO	U GET MARRIEI	D? (City,	, State c	or Country)			
7. SPOUSE'S NAME (First, middle, last)       8. SPOUSE'S BIRTHDAY (Month, day, year)       9. SPOUSE'S SOCIAL SECURITY NO.								SECURITY NO.					
10A. IS YOUR SPOUSE ALSO A VETERAN?     10B. SPOUSE'S VA FILE NO. (If any)     11. DO YOU LIVE WITH YOUR SPOUSE													
YES       NO       (If "Yes," complete Item 10B, if known)         YES       NO       (If "Yes," complete Item 10B, if known)							f "Yes," skip to Item 4) (If "No," complete ems 12, 13A & 13B)						
							N MUCH DO YOU NTRIBUTE MONTHLY SPOUSE'S SUPPORT?						
INFORMATION ABOUT THE VETERAN'S & SPOUSE'S PREVIOUS MARRIAGES													
<b>NOTE:</b> Furnish the following information about all of your and your present spouse's previous marriages. If you need additional space please attach a separate sheet of paper providing the requested information about the marriages.							l space please						
14. HOW MANY TIMES													
	r						r						
15A. DATE OF MARRIAGE (Month, Day, Year)	15B. PLACE MARRIAG (City, State or C	<del>SE</del>	15C. N	15C. NAME OF FORMER SPOL (First, Middle, Last)					15E. PLACE MARRIAGE ENDED (City, State or Country)		15F. REASON MARRIAGE ENDED (Death, Divorce)		
16. HOW MANY TIMES	S HAS YOUR CUP	RRENT SPO	USE BEEN	I MARRIED?									
17A. DATE OF MARRIAGE (Month, Day, Year)	17B. PLACE MARRIAG (City, State or C	θE	17C. N	17C. NAME OF FORMER SPOU (First, Middle, Last)			17D. DATE MARRIAGE ENDI (Month, Day, Yea		17E. PLACE MARRIAGE ENDED (City, State or Country)			17F. REASON MARRIAGE ENDED (Death, Divorce)	

	PART III - INFO	RMATION ABOUT	<b>YOUR</b>	UNMARRIED	DEPENDENT	CHILDREN
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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 "N	o," skip to Part IV)			1	19E. CHECK EACH APPLICABLE CATEGORY							
19A. NAME OF CHILD (First, Middle, Last)	19B. DATE OF BIRTH (Mo., Day, Yr.)	19C. PLACE OF BIRTH (City, State or Country)	BIOLOGICAL			SERIOUSLY DISABLED	CHILD PREVIOUSLY MARRIED					
	INFORM	ATION ABOL	JT THE CHILDRE		NOT LIV	E WITH Y	DU					
20A. NAME OF CHILD (First, Middle, Last) 20B. CHILD'S COMPLETE ADDRESS					20C. NAME OF PERSON CHILD LIVES WITH <i>(If applicable)</i> 20D. MONTHLY A YOU CONTRIE TO CHILD'S SU							
								\$				
								\$				
								\$				
					\$							
									Day Voar)			
21A. WHAT DISABILITY(IES) PREVENT YOU FROM WORKING?       21B. WHEN DID THE DISABILITY(IES) BEGIN? (Month, Day, Yea)							, <i>Duy</i> , <i>Teur)</i>					
22A. ARE YOU CLAIMING A SPECIAL MONTHLY PENSION BECAUSE YOU NEED THE REGULAR ASSISTANCE OF ANOTHER PERSON, HAVE SEVERE VISUAL PROBLEMS, OR ARE HOUSEBOUND?					22B. ARE YOU NOW OR HAVE YOU BEEN RECENTLY HOSPITALIZED OR GIVEN OUTPATIENT OR HOME CARE? (Due to the disability(ies) listed in Item 21A)							
YES NO				YES	YES NO (If "Yes," complete Items 23A & 23B)							
23A. DATE(S)	OF RECENT HOSP	ITALIZATION OF	RCARE	23B	. NAME AND	) MAILING AD	DRESS OF FA	ACILITY OR D	OCTOR			
24A. ARE YOU NOW EMPLOYED?				24B. WHEN	N DID YOU L	AST WORK?	(Month, Day,	Year)				
	YES NO (If "No," complete Item 24B)											
24C. WERE YOU SELF-EMPL	24C. WERE YOU SELF-EMPLOYED BEFORE BECOMING TOTALLY DISABLED?					VORK DID YC	U DO?					
	(If "Yes," complete I	Items 24D and 24	4E)									
24E. ARE YOU STILL SELF-E	24E. ARE YOU STILL SELF-EMPLOYED?					VORK DO YO	U DO NOW?					
$\square YES \square NO \qquad (If "Yes," complete Item 24F)$												

PART IV - INFORMATION ABOUT YOUR DISABILITY AND BACKGROUND (Continued)							
<b>NOTE</b> : In the table below, tell us about all of your employment, including self-employment, dating from one year before you became disabled to the present.							
25A. WHAT WAS THE NAME AND ADDRESS OF YOUR EMPLOYER?	25B. WHAT WAS YOUR JOB TITLE?	25C. WHEN DID YOUR WORK BEGIN? (Mo., day, year)	25D. WHEN DID YOUR WORK END? (Mo., day, year)	25E. HOW MANY DAYS WERE MISSED DUE TO DISABILITY?	25F. WHAT WERE YOUR TOTAL ANNUAL EARNINGS?		
					\$		
					\$		
					\$		
					\$		
					\$		
					\$		
26A. CHECK THE HIGHEST YEAR OF EDUCATION YOU COMPLETED:							
Grade school:							
	6 7 8	9 10	11 12				
College:							
1 2 3 4 Over 4							
26B. LIST THE OTHER TRAINING OR EXPERIENCE YOU HAVE AND ANY CERTIFICATES THAT YOU HOLD:							
PART V - NURSING HOME INFORMATION							
<b>NOTE</b> : To get your claim processed faster, 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. Also tell us the amount you pay out-of-pocket for your care.							
27A. ARE YOU NOW IN A NURSING HOME?		27B. WHAT IS TI FACILITY?	HE NAME AND COM	PLETE MAILING ADD	RESS OF THE		
YES NO (If "Yes," complete Ite	m 27B)						
27C. DOES MEDICAID COVER ALL OR PART OF YO	OUR NURSING HOME COSTS	? 27D. HAVE YOU	APPLIED FOR MEDI	CAID?			
YES     NO     (If "No," complete Iter.	n 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. You must report net worth for yourself and all persons for whom you are claiming benefits. VA cannot pay you a pension if your net worth is sizeable. Net worth is the market value of all interest and rights you have in any kind of property less any mortgages, liens 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 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)							
For items 26A through 26F, provide the a	hounts. If none, write		Name	Name		Name	
SOURCE OF ASSETS	VETERAN	SPOUSE	(First, middle, last)	(First, middle, last)	(First, middle, last)	(First, middle, last)	
28A. Cash. bank accounts.	\$	\$	\$	\$	\$	\$	
certificates of deposit (CDs)	Interest y n	Interest y n	Interest y n	Interestyn	Interest y n	Interest y n	
,	bearing:		bearing:	bearing:	bearing:	bearing: U'	
28B. IRAs, Keogh Plans, etc.							
	Interest y n	Interest y n	Interest bearing: y n	Interest y n	Interest y n	Interest y n	
28C. Stocks, bonds, mutual funds							
	bearing: y n	Interest y n bearing:	Interestyn bearing:yn	bearing: y n	bearing: y n	bearing: y n	
28D. Value of business assets	Interest y n	Interest y n	Interestyn	Interest y n	Interest y n	Interest y n	
						bearing:	
28E. Real property							
(Not your home)							
28F. All other property							
					TO		
	PART VII - INFORMATION ABOUT TRANSFERRED ASSETS NOTE - Provide the conditions of the transfer in Item 37, "Remarks," including any remaining right, privilege of ownership, benefit, or control you have over the asset.						
29A. HAVE YOU TRANSFERRED ANY				e of ownership, benefit,	or control you have ove	er the asset.	
YES NO (If "Yes," pro		. ,		ne value \$	)		
29B. HAVE YOU TRANSFERRED ANY			\$20,000?				
	ovide the date of tran		and th	ne value \$	)		
PART VIII - INFORMATION ABOUT YOU AND YOUR DEPENDENTS EXPECTED ANNUAL INCOME IMPORTANT - Report payments from any source, unless the law says not to count them. Report <i>all</i> income and its sources and VA will determine whether to count it.							
	ly source, unless the r	aw says not to cours	t them. Report an incom				
NOTE: Report the total amounts before yo							
but you don't know how much it will be, give your closest estimate 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.							
30. HAVE YOU CLAIMED OR ARE YOU RECEIVING DISABILITY BENEFITS FROM THE SOCIAL SECURITY ADMINISTRATION (SSA)?							
MONTHLY INCOME - TELL US THE INCOME YOU AND YOUR DEPENDENTS RECEIVE EVERY MONTH							
CHILD(REN)							
			Name	Name	Name	Name	
SOURCE OF MONTHLY INCOME	VETERAN	SPOUSE	(First, middle, last)	(First, middle, last)	(First, middle, last)	(First, middle, last)	
31A. Gross Wages & Salary	\$	\$	\$	\$	\$	\$	
31B. Social Security	Ψ	¥	+	+	+	¥	
31C. U.S. Civil Service							
31D. U.S. Railroad Retirement							
31E. Military Retirement							
31F. Black Lung Benefits							
31G. Supplemental Security Income							
(SSI)/Public Assistance							
31H. Other income received							
monthly (Please write source below)							

PART VIII - INFORMATION ABOUT YOU AND YOUR DEPENDENTS EXPECTED ANNUAL INCOME (Continued)								
PART VIII - INFO	ORMATIC	ON ABOUT YO	OU AND YOUR		EXPECTED AN	NUAL IN	COME	(Continued)
EXPECTED INC	OME FOR	THE NEXT 12 M	ONTHS - TELL US	ABOUT OTHER IN	ICOME YOU AND YO	OUR DEPE	NDENTS	RECEIVE
					CHILI	D(REN)		
	OURCE OF INCOME FOR THE NEXT 12 MONTHS		SPOUSE	Name (First, middle, last)	Name (First, middle, last)	Name (First, middle, last)		Name (First, middle, last)
32A. Total interest and di	Total interest and dividends       \$       \$       \$       \$       \$       \$							\$
32B. Worker's compensation unemployment com								
32C. Other income expec (Please write source								
PART IX - IN	FORMA	TION ABOUT	YOUR MEDIC	AL, LEGAL OR	OTHER UNREI	MBURSE	D EXP	ENSES
PART IX - INFORMATION ABOUT YOUR MEDICAL, LEGAL OR OTHER UNREIMBURSED EXPENSES 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.								
33A. AMOUNT YOU PAID	(Name of doctor, nospital, ) Keel (North Charles and Charle						ATIONSHIP OF SON FOR WHOM	
\$								
\$								
\$								
\$								
		PAR	T X - 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 34-36. 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 34, 35 and 36 to enroll in direct deposit. If you <i>do not</i> 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.								
34. ACCOUNT NUMBER -	PLEASE CH							
CHECKING SAVINGS I CERTIFY THAT <i>I DO NOT</i> HAVE AN ACCOUNT WITH A FINANCIAL INSTITUTION OR A CERTIFIED PAYMENT AGENT								
35. NAME OF FINANCIAL IN	STITUTION							
36. ROUTING OR TRANSIT NUMBER								

# PART XI - REMARKS

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

## PART XII - CERTIFICATION AND SIGNATURE

I certify and authorize that the statements in this document are true and complete to the best of my knowledge. I authorize any person or entity, including but not limited to any organization, service provider, employer, or government agency, to give the Department of Veterans Affairs any information about me except protected health information, and I waive any privilege which makes the information confidential.

38A. SIGNATURE OF CLAIMANT	38B. DATE SIGNED	
If signature of claimant made by "X" mark, you must have 2 people their names and addresses.	you know witness as you	u sign. They must then sign the form and print
39A. SIGNATURE AND PRINTED NAME OF WITNESS	39B. ADDRESS OF WITN	ESS
40A. SIGNATURE AND PRINTED NAME OF WITNESS PENALTY: The law provides severe penalties which include fine	40B. ADDRESS OF WITN	
a material fact, knowing it to be false, or for the fraudulent accep		