

# Confidential Veterans Planning Questionnaire for Eligibility

Agent's Name: Interview Date: Agents' Email: Agent's Phone: **Contact information for veteran or widow**

Date of Birth

Date of Death

Veteran

Spouse

Email: Home Phone: Cell Phone: Street: City: State: ZipCode: Claimant Rep: Email: Claimant Rep Phone DOB. Relation to Claimant Reps. Address 

Veteran's Service Period. Service period is 90 days of service with 1 day of active duty within the following dates.

**Did the veteran serve during WWII 12/7/1942 to 12/31/1946**

**Did the veteran serve during Korean War 6/27/1950 to 1/31/1955**

**Did the veteran serve during Vietnam 8/5/1964 to 5/7/1975**

**Did the veteran serve in the country of Vietnam from 2/28/1961 to 5/7/1975**

Veteran does not have to be overseas fighting a war. They can be located in the US as long as they have 90 days of service with 1 day of active duty during the dates listed above.

Example of Eligibility: Veteran entered active duty on 1/26/1955 and served 90 days. He is eligible because the Korean war ended on 1/31/1955 and he had 2 days of active duty during a war time period.

The RESERVES eligibility: Must have served in RESERVES for 6 continuous years with 1 day of active duty during a war time period.

Is Veterans or Widow receiving VA disability now? If YES what is the dollar amount received?

Is the veteran or widow receiving and SSI or disability Soc. Sec.? If Yes what is the dollar amount?

If veteran, spouse of veteran or widow has applied for Medicaid or currently receiving Medicaid they are not eligible for this VA pension.

If the widow was not married to veteran on his death or she has remarried after his death she is not eligible.

Does the Veteran or Widow have Long-TermCare Insurance? Yes or NO

**The following documents are required to file for VA aid & attendance.**

Copy of veterans military records a DD214 or Discharge. Copy of marriage license if veteran is married. Copy of veteran's death certificate if widow is applying for benefits. These can be emailed to [vetformsforyou@gmail.com](mailto:vetformsforyou@gmail.com)

The CLAIMANT REPRESENTATIVE is the liaison to the VA for the veteran or widow. The veterans spouse cannot be the CLAIMANT REPRESENTATIVE. If the VA requires additional information they will send a letter of request to the CLAIMANT REPRESENTATIVE. The CLAIMANT REPRESENTATIVE would NOT respond to the VA request. They will mail the VA request to ECFR and ECFR would respond to the VA information request.

The VA pension of aid & attendance is always paid to the veteran or widow. The medical expenses of the veteran or widow's Care Tender while in their home are expenses that will be reimbursed to the veteran or widow. If the Care Tender expenses are paid by an insurance company or other government programs there is nothing for the VA to reimburse. The Care Tender can be a professional trained person or a family or friend that is not medically qualified. The only exception to the Care Tender is the veteran's spouse. **The spouse will not be paid to provide housekeeping or medical care of the veteran.** The expenses of Assisted Living, Nursing Home and Adult Day Care are also reimbursed to the veteran or widow. Any medical insurance premiums paid by veteran or widow are also reimbursed.

This form should be completed by the agent. If we cannot read the agents writing or information on this form it will be returned to the agent. ECFR will not contact the veteran or widow for the information requested on this form. The agent will scan and email this form to [VETFORMSFORYOU@GMAIL.COM](mailto:VETFORMSFORYOU@GMAIL.COM)