

RICHLAND COUNTY VETERANS SERVICE COMMISSION

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www.richlandcountyvets.org

IMPROVED PENSION CHECKLIST

You may be eligible for pension based on you and your spouse's income and medical expenses. Please bring in the following documentation to file claim for benefits.

1. Social Security Income Statements for you and your spouse.
2. Pension Income Statements.
3. Interest Statements for any IRA, Stocks & Bonds or CD's.

Generally, a 1099R is issued for these once a year.

4. A current bank statement for all checking and savings accounts.
5. Direct Deposit information:
Routing number and account number, or a voided blank check
6. Any other income statements that pay you a monthly or annual income.
7. Any supplemental health policy or health care insurance where you pay a premium
8. A copy of your marriage certificate.
9. A copy of all divorce decrees.
10. A copy of any death certificates.

If you have any questions about any of the items mentioned above, please call one of the service officers. Some of these items may not apply to you or your spouse, and are listed only to help you prepare to file a claim for improved pension.

We hope this is helpful, and it is our sincere pleasure to be at your assistance.