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This is a small checklist for improved pension. You may be eligible for pension based on you and your wife'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. If you have to purchase any over the counter items that may be countable such as IE: Depends, Ensure, Diabetes testing supplies, Oxygen, and other home health needs which may be necessary from your physician. I do not need receipts for these items only a monthly estimate that you spend out of pocket.
9. Any other expenses that may be classified as a medical expense.
10. Nursing home or assisted care letter itemizing cost of care.
11. I will need a copy of your marriage certificate.
12. I am also providing a form 21-2680 Examination for Housebound or Permanent Need for Regular Aid and Attendance. If your Physician feels that you may qualify to be in either condition, your physician will fill this form out will allow you to receive more benefit.

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

I hope this is helpful and as always it is my sincere pleasure to be at your assistance.

Respectfully,

Anthony R. Delong Daniel R. Mosier Penni M. Jordan Geoffrey A. Newland Joshua P. Hurrell
Service Officer Service Officer Service Officer Service Officer Service Officer