

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 www.va.gov/directory, 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: https://iris.va.gov.

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 www.va.gov/vaforms.

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.

21-527

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 www.va.gov/directory. 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 http://www.va.gov/opa/marriage/.

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.

OMB Approved No. 2900-0002 Respondent Burden: 1 Hour Expiration Date: 12/31/2015

D epartm	nent of Vet	erans A	Affairs		INCOM	E, NET	WORTH, A	ND EN	IPLOY	MENT STA	TEMENT
IMPORTANT - Read Privacy Act and Respondent Burde completing the form. Type, print, or write plainly.					len Information and Instructions carefully before					•	TE IN THIS SPACE) ATE STAMP)
PART I - VETERAN/CLAIMANT INFORMATION											
1. FIRST NAME - MIDE	DLE NAME - LAST	NAME OF	VETERAN/	CLAIMANT (Type or Pri	nt)					
2A. VETERAN/CLAIMANT SOCIAL SECURITY NO. 2B. VA FILE NO.											
3. ADDRESS OF VETE	ERAN/CLAIMANT	(Number, st	reet or rur	al route, Cit	y or P.O., St	ate and Z	IP Code)				
	4A. TELEF	PHONE NUM	MBER(S) (In	Include Area Code)				4B. E-MAIL ADDRESS (If applicable)			ole)
DAYTIME EVENING			CELL								
							RMATION				
NOTE: If married,		rovide a c	opy of yo	ur marriaç	ge certifica	ate.					
5. WHAT IS YOUR MA	RITAL STATUS? WIDOWED	DIVO	RCED	NEVER	R MARRIED		(If you are divor (If never married			kip to Item 14)	
6A. WHEN WERE YOU	J MARRIED? (Mo	onth, day, ye	ar)		6B. WHER	E DID YO	U GET MARRIED	0? (City, S	State or C	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 Y									O YOU LIVE WITH YOUR SPOUSE?		
YES NO (If "Yes," complete Item 10B, if known) YES NO (If "Yes," complete Item 10B, if known) YES NO 14) (If "No," complete Items 12, 13A & 13B)											
								W MUCH DO YOU NTRIBUTE MONTHLY SPOUSE'S SUPPORT?			
	INFO	RMATIO	N ABOU	T THE VE	TFRAN'S	& SPO	USE'S PREV	IOUS M	IARRIA	GES	
NOTE: Furnish the attach a separate s	following inforr	mation abo	out all of y	our and yo	our presen	t spouse	's previous ma	arriages.	If you r	need additiona	l space please
14. HOW MANY TIMES	S HAVE YOU BEE	N MARRIEI)?								
15A. DATE OF MARRIAGE (Month, Day, Year)	15B. PLACE MARRIAG (City, State or C	SE	15C. NAME OF FORMER SPOU (First, Middle, Last)			IMARRIAGE EN		DED MARRIA		PLACE GE ENDED e or Country)	15F. REASON MARRIAGE ENDED (Death, Divorce)
16. HOW MANY TIMES	S HAS YOUR CUF	RRENT SPO	USE BEEN	MARRIED?							
17A. DATE OF MARRIAGE (Month, Day, Year)	17B. PLACE MARRIAG (City, State or C	SE.	17C. NAME OF FORMER SPOU (First, Middle, Last)			JSE	17D. DATE MARRIAGE END (Month, Day, Ye		MARRIA	PLACE GE ENDED e 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 DEPENDENT CHILDREN? NO (If "No," skip to Part IV) 19E. CHECK EACH APPLICABLE CATEGORY 19C. PLACE 19B. DATE 19D SOCIAL 18-23 YRS. OF BIRTH 19A. NAME OF CHILD CHILD OF BIRTH **SECURITY** OLD AND SERIOUSLY (City, State or (First, Middle, Last) BIOLOGICAL ADOPTED STEPCHILD PREVIOUSLY (Mo., Day, Yr.) NUMBER ATTENDING DISABLED Country) MARRIED SCHOOL INFORMATION ABOUT THE CHILDREN WHO DO NOT LIVE WITH YOU 20D. MONTHLY AMOUNT 20C. NAME OF PERSON CHILD 20A. NAME OF CHILD 20B. CHILD'S YOU CONTRIBUTE (First, Middle, Last) COMPLETE ADDRESS LIVES WITH (If applicable) TO CHILD'S SUPPORT \$ \$ \$ \$ PART IV - INFORMATION ABOUT YOUR DISABILITY(IES) AND BACKGROUND 21A. WHAT DISABILITY(IES) PREVENT YOU FROM WORKING? 21B. WHEN DID THE DISABILITY(IES) BEGIN? (Month, Day, Year) 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 NO (If "Yes," complete Items 23A & 23B) 23A. DATE(S) OF RECENT HOSPITALIZATION OR CARE 23B. NAME AND MAILING ADDRESS OF FACILITY OR DOCTOR 24A. ARE YOU NOW EMPLOYED? 24B. WHEN DID YOU LAST WORK? (Month, Day, Year) YES □ NO (If "No," complete Item 24B) 24C. WERE YOU SELF-EMPLOYED BEFORE BECOMING TOTALLY DISABLED? 24D. WHAT KIND OF WORK DID YOU DO? YES | NO (If "Yes," complete Items 24D and 24E) 24E. ARE YOU STILL SELF-EMPLOYED? 24F. WHAT KIND OF WORK DO YOU DO NOW? YES | NO (If "Yes," complete Item 24F)

PART IV - INFORMATION ABOUT YOUR DISABILITY AND BACKGROUND (Continued)							
NOTE: 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)		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:			•			
On the only only							
Grade school:							
1 2 3 4 5	□ 6 □ 7 □ 8	9 10	1112				
College:							
1234Over 4							
26B. LIST THE OTHER TRAINING OR EXPERIENCE YOU HAVE AND ANY CERTIFICATES THAT YOU HOLD:							
PART V - NURSING HOME INFORMATION							
NOTE : 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 ADDR	RESS OF THE			
YES NO (If "Yes," complete Ite.	m 27B)						
27C. DOES MEDICAID COVER ALL OR PART OF YO	OUR NURSING HOME COSTS	3? 27D. HAVE YOU	APPLIED FOR MEDIC	CAID?			
YES NO (If "No" complete Ites	m 27D)		¬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 ar	CHILD(REN)						
SOURCE OF ASSETS	VETERAN	SPOUSE	Name (First, middle, last)	Name (First, middle, last)	Name (First, middle, last)	Name (First, middle, last)	
28A. Cash, bank accounts, certificates of deposit (CDs)	\$ Interest bearing: y n	\$ Interestyn	\$ Interest bearing: y n				
28B. IRAs, Keogh Plans, etc.	Interest y n	Interestyn	Interest y n	Interest y n	Interest y n	Interest bearing: y n	
28C. Stocks, bonds, mutual funds	Interest y n	Interest y n	Interest y n	Interest y n	Interest y n	Interest bearing: y n	
28D. Value of business assets	Interest y n	Interest y n	Interest y n	Interest y n	Interest y n	Interest bearing: y n	
28E. Real property (Not your home)							
28F. All other property							
	PART VII - IN	FORMATION	ABOUT TRANS	FERRED ASSE	TS		
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 ASSETS IN THE LAST TWO (2) YEARS? YES NO (If "Yes," provide the date of transfer and the value \$)							
29B. HAVE YOU TRANSFERRED ANY ASSET(S) AT ANY TIME IN EXCESS OF \$20,000? YES NO (If "Yes," provide the date of transfer and the 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 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, 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)? YES NO							
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)	
31A. Gross Wages & Salary	\$	\$	\$	\$	\$	\$	
31B. Social Security							
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)								
EXPECTED INCOME FOR THE NEXT 12 MONTHS - TELL US ABOUT OTHER INCOME YOU AND YOUR DEPENDENTS RECEIVE							S RECEIVE	
				CHILD(REN)				
SOURCE OF INCOME FOR THE NEXT 12 MONTHS		VETERAN	SPOUSE	Name (First, middle, last)	Name (First, middle, last)	Name (First, middle, last)	Name (First, middle, last)	
32A. Total interest and dividends		\$	\$	\$	\$	\$	\$	
32B. Worker's compensa unemployment com								
32C. Other income expected (Please write source below)								
PART IX - II	NFORMA	TION ABOUT	YOUR MEDIC	 CAL, LEGAL OR	OTHER UNREI	 MBURSED EX	PENSES	
NOTE: Family medical unreimbursed medical your household. Also, sillness and burial experthe year following the ytuition, fees, and mate disability benefits. Whe are paid. Do not include	expenses, expenses, show unreinses are urear of dea erials. Shown determin	and certain oth including the M mbursed last illn reimbursed amount. Educational ow medical, legaling your income	ner expenses you edicare deduction ess and burial expounts you paid for or vocational rehall or other expens we may be able to	actually paid may i, you paid over the penses and educati the last illness and bilitation expenses es you paid becau o deduct them from	be deductible from a last year for yours onal or vocational ruburial of a spouse of are amounts you passe of a disability the disability benefineeded, attach a si	n your income. Seelf or relatives we habilitation expeor child at any time aid for courses of for which you we its for the year in eparate sheet.	show the amount of the are members of enses you paid. Last e prior to the end of education including are awarded civilian which the expenses	
00/ 11/ 11/10 01/11 1 0 0		ATE PAID 33C. PURPOSE (Doc charges, attorned)		. I (Name of doctor i		ospital, RELATIONSHIP OF		
\$								
\$								
\$								
\$								
PART X - DIRECT DEPOSIT INFORMATION								
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 CHECK THE APPROPRIATE BOX AND PROVIDE THE ACCOUNT NUMBER, IF APPLICABLE CHECKING SAVINGS I CERTIFIED PAYMENT AGENT ACCOUNT AN IMPER								
ACCOUNT NUMBER 35. NAME OF FINANCIAL INSTITUTION								
36. ROUTING OR TRANSIT NUMBER								

PART XI - REMARKS						
37. REMARKS - USE THIS SPACE FOR ANY ADDITIONAL STATEMENTS	THAT YOU WOULD LIKE T	O MAKE CONCERNING YOUR APPLICATION				
DART YII - CER	TIEICATION AND S	SIGNATURE				
PART XII - CERTIFICATION AND SIGNATURE						
I certify and authorize that the statements in this docu	ument are true and c	complete to the best of my knowledge. I authorize				
any person or entity, including but not limited to any of give the Department of Veterans Affairs any informat	organization, service ion about me except	provider, employer, or government agency, to protected health information, and I waive any				
privilege which makes the information confidential.	ion about me except	r protected median information, and i maire any				
38A. SIGNATURE OF CLAIMANT		38B. DATE SIGNED				
If signature of claimant made by "X" mark, you must have 2 people their names and addresses.	e you know witness as yo	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	40B. ADDRESS OF WITN	IESS				
PENALTY : The law provides severe penalties which include fine	 e or imprisonment, or bo	th, for the willful submission of any statement or evidence of				
a material fact, knowing it to be false, or for the fraudulent accep	ptance of any payment to	which you are not entitled.				