

Section I: Veteran Information

3. VA file number

File number: 123456789

SPECIFY INCOME PARENT

RECIPIENT'S
RELATIONSHIP TO
VETERAN:

SPECIFY INCOME CHILD

RECIPIENT'S
RELATIONSHIP TO
VETERAN:

SPECIFY INCOME CUSTODIAN

RECIPIENT'S
RELATIONSHIP TO
VETERAN:

SPECIFY INCOME SPOUSE

RECIPIENT'S
RELATIONSHIP TO
VETERAN:

SPECIFY INCOME OTHER

RECIPIENT'S
RELATIONSHIP TO
VETERAN:

SPECIFY INCOME VETERAN

RECIPIENT'S
RELATIONSHIP TO
VETERAN:

SPECIFY INCOME Cousin

RECIPIENT'S
RELATIONSHIP TO
VETERAN:

SPECIFY NAME OF Jane Doe
INCOME RECIPIENT

(Only needed if
Custodian of child,
child, parent, or
other):

SPECIFY NAME OF Sam Jenkins
INCOME RECIPIENT

(Only needed if
Custodian of child,
child, parent, or
other):

SPECIFY NAME OF INCOME RECIPIENT

(Only needed if
Custodian of child,
child, parent, or
other):

SPECIFY NAME OF INCOME RECIPIENT

(Only needed if
Custodian of child,
child, parent, or
other):

SPECIFY THE TYPE OF INCOME: RETIREMENT_PENSION

SPECIFY THE TYPE OF INCOME: CIVIL_SERVICE

SPECIFY THE TYPE OF INCOME: UNEMPLOYMENT

SPECIFY THE TYPE OF INCOME: OTHER

SPECIFY THE TYPE OF INCOME: Stocks

SPECIFY THE TYPE OF INCOME: SOCIAL_SECURITY

SPECIFY THE TYPE OF INCOME: WAGES

GROSS MONTHLY INCOME: 102.33

GROSS MONTHLY INCOME: 99999.99

GROSS MONTHLY INCOME: 99

GROSS MONTHLY INCOME: 1099.99

GROSS MONTHLY INCOME: 12345.67

GROSS MONTHLY INCOME: 1000

SPECIFY INCOME PAYER (Name of
business, financial
institution, or
program, etc.): Personnel Management

SPECIFY INCOME Social Security Administration
PAYER (Name of
business, financial
institution, or
program, etc.):

SPECIFY INCOME Investment Company
PAYER (Name of
business, financial
institution, or
program, etc.):

SPECIFY INCOME Generic Company, LLC
PAYER (Name of
business, financial
institution, or
program, etc.):

SPECIFY INCOME Pension Benefit Management
PAYER (Name of
business, financial
institution, or
program, etc.):

SPECIFY INCOME Agency of Unemployment
PAYER (Name of
business, financial
institution, or
program, etc.):

Section II: Claimant Information

5. Claimant Social Security Number

1

SPECIFY INCOME CUSTODIAN

RECIPIENT'S

RELATIONSHIP TO

VETERAN:

SPECIFY NAME OF

INCOME RECIPIENT

(Only needed if

Custodian of child,

child, parent, or

other):

IDENTIFY THE TYPE

OF ASSET AND

SUBMIT THE

REQUIRED FORM

ASSOCIATED:

GROSS MONTHLY

INCOME:

SPECIFY VALUE OF

YOUR PORTION OF

THE PROPERTY:

CUSTODIAN

Jim Brown

FARM

5555.55

5555555.55

2

SPECIFY INCOME OTHER

RECIPIENT'S

RELATIONSHIP TO

VETERAN:

SPECIFY INCOME Friend

RECIPIENT'S

RELATIONSHIP TO

VETERAN:

SPECIFY NAME OF Brandon Jones

INCOME RECIPIENT

(Only needed if

Custodian of child,

child, parent, or

other):

IDENTIFY THE TYPE BUSINESS

OF ASSET AND

SUBMIT THE

REQUIRED FORM

ASSOCIATED:

GROSS MONTHLY 999.99

INCOME:

SPECIFY VALUE OF 10000

YOUR PORTION OF

THE PROPERTY:

3

SPECIFY INCOME PARENT

RECIPIENT'S

RELATIONSHIP TO

VETERAN:

SPECIFY NAME OF Edmund Doe

INCOME RECIPIENT

(Only needed if

Custodian of child,

child, parent, or

other):

IDENTIFY THE TYPE RENTAL_PROPERTY

OF ASSET AND

SUBMIT THE

REQUIRED FORM

ASSOCIATED:

GROSS MONTHLY 123.45

INCOME:

SPECIFY VALUE OF 12345.67

YOUR PORTION OF

THE PROPERTY:

4

SPECIFY INCOME CUSTODIAN

RECIPIENT'S

RELATIONSHIP TO

VETERAN:

SPECIFY NAME OF Jim Brown

INCOME RECIPIENT

(Only needed if

Custodian of child,

child, parent, or

other):

IDENTIFY THE TYPE FARM

OF ASSET AND

SUBMIT THE

REQUIRED FORM

ASSOCIATED:

GROSS MONTHLY 1000

INCOME:

SPECIFY VALUE OF 12345.67

YOUR PORTION OF

THE PROPERTY:

Section II: Claimant Information

6. Claimant telephone number

1

SPECIFY INCOME RECIPIENT'S
RELATIONSHIP TO
VETERAN:

INCOME TYPE Rental
OTHER:

SPECIFY HOW INCOME IS
GENERATED: OTHER

GROSS MONTHLY INCOME: \$12,345.67

SPECIFY FAIR MARKET VALUE OF
THIS ASSET: \$12,345,678.91

CAN THIS ASSET BE SOLD?: false

EXPLAIN ANY MITIGATING
CIRCUMSTANCES THAT PREVENT THE
SALE OF THIS ASSET: Contractual obligations

2

SPECIFY INCOME RECIPIENT'S
RELATIONSHIP TO
VETERAN:

SPECIFY HOW INCOME IS
GENERATED: INTELLECTUAL_PROPERTY

GROSS MONTHLY INCOME: \$100.00

SPECIFY FAIR MARKET VALUE OF
THIS ASSET: \$1,000.00

CAN THIS ASSET BE SOLD?: true

3

RELATIONSHIP TYPE Sibling

OTHER:

SPECIFY INCOME OTHER

RECIPIENT'S

RELATIONSHIP TO

VETERAN:

SPECIFY NAME OF John Smith

INCOME RECIPIENT

(Only needed if
Custodian of child,
child, parent, or
other):

SPECIFY HOW USE_OF_LAND

INCOME IS

GENERATED:

GROSS MONTHLY \$123.00

INCOME:

SPECIFY FAIR \$1,234.00

MARKET VALUE OF

THIS ASSET:

CAN THIS ASSET BE true

SOLD?:

4

SPECIFY INCOME PARENT

RECIPIENT'S

RELATIONSHIP TO

VETERAN:

SPECIFY NAME OF John Doe

INCOME RECIPIENT

(Only needed if

Custodian of child,

child, parent, or

other):

SPECIFY HOW MINERALS_LUMBER

INCOME IS

GENERATED:

GROSS MONTHLY \$100.00

INCOME:

SPECIFY FAIR \$300.00

MARKET VALUE OF

THIS ASSET:

CAN THIS ASSET BE true

SOLD?:

Section II: Claimant Information

7. Claimant type

1

SPECIFY ASSET'S OTHER

ORIGINAL OWNER'S

RELATIONSHIP TO

VETERAN:

SPECIFY ASSET'S Second cousin twice removed of my mother in law

ORIGINAL OWNER'S

RELATIONSHIP TO

VETERAN (OTHER):

WHAT WAS THE 823456700.89

SALE PRICE? (If
applicable):

WHAT WAS THE 723456700.89

GAIN? (Capital gain,
etc.):

SPECIFY HOW THE OTHER

ASSET WAS

TRANSFERRED:

SPECIFY HOW THE Earned income from doing work on my siblings house to clean in

ASSET WAS

TRANSFERRED

(OTHER):

WHAT ASSET WAS Clothes from my grandmothers attic which have been passed down through the family and are
TRANSFERRED?: priceless - value estimatedWHO RECEIVED THE JohnsonbergerheimerJohnathan JacobJingleheimerSchmidt Jr.
ASSET?:

RELATIONSHIP TO Sibling

NEW OWNER:

WHAT WAS THE FAIR 100000000

MARKET VALUE

WHEN

TRANSFERRED?:

2

SPECIFY ASSET'S OTHER

ORIGINAL OWNER'S

RELATIONSHIP TO

VETERAN:

SPECIFY ASSET'S Cousin

ORIGINAL OWNER'S

RELATIONSHIP TO

VETERAN (OTHER):

WHAT WAS THE 8234567.89

SALE PRICE? (If
applicable):

WHAT WAS THE 7234567.89

GAIN? (Capital gain,
etc.):

SPECIFY HOW THE OTHER

ASSET WAS

TRANSFERRED:

SPECIFY HOW THE Earned

ASSET WAS

TRANSFERRED

(OTHER):

WHAT ASSET WAS Clothes

TRANSFERRED?:

WHO RECEIVED THE John Doe Jr.

ASSET?:

RELATIONSHIP TO Sibling

NEW OWNER:

WHAT WAS THE FAIR 1000000

MARKET VALUE

WHEN

TRANSFERRED?:

3

SPECIFY ASSET'S CHILD

ORIGINAL OWNER'S

RELATIONSHIP TO

VETERAN:

WHAT WAS THE 100

SALE PRICE? (If
applicable):

WHAT WAS THE 0

GAIN? (Capital gain,
etc.):

SPECIFY HOW THE GIFTED

ASSET WAS

TRANSFERRED:

WHAT ASSET WAS Artwork

TRANSFERRED?:

WHO RECEIVED THE Jacob Doe Sr.

ASSET?:

RELATIONSHIP TO Aunt

NEW OWNER:

WHAT WAS THE FAIR 123.12

MARKET VALUE

WHEN

TRANSFERRED?:

4

SPECIFY ASSET'S PARENT

ORIGINAL OWNER'S

RELATIONSHIP TO

VETERAN:

WHAT WAS THE 2000

SALE PRICE? (If
applicable):

WHAT WAS THE 200.99

GAIN? (Capital gain,
etc.):

SPECIFY HOW THE TRADED

ASSET WAS

TRANSFERRED:

WHAT ASSET WAS Bike

TRANSFERRED?:

WHO RECEIVED THE John Doe Jr.

ASSET?:

RELATIONSHIP TO Brother

NEW OWNER:

WHAT WAS THE FAIR 1800.99

MARKET VALUE

WHEN

TRANSFERRED?:

Section II: Claimant Information

8. Income/net worth date range*1*

DATE TRUST ESTABLISHED (MM/DD/YYYY): 1982-02-02

SPECIFY MARKET VALUE OF ALL ASSETS WITHIN THE TRUST AT TIME OF ESTABLISHMENT: 500000

SPECIFY TYPE OF TRUST ESTABLISHED: IRREVOCABLE

HAVE YOU ADDED FUNDS TO THE TRUST AFTER IT WAS ESTABLISHED?: false

ARE YOU RECEIVING INCOME FROM THE TRUST?: false

IS THE TRUST BEING USED TO PAY FOR OR TO REIMBURSE SOMEONE ELSE FOR YOUR MEDICAL EXPENSES?: false

WAS THE TRUST ESTABLISHED FOR A CHILD OF THE VETERAN WHO WAS INCAPABLE OF SELF-SUPPORT PRIOR TO REACHING AGE 18?: false

DO YOU HAVE ANY ADDITIONAL AUTHORITY OR CONTROL OF THE TRUST?: false

2

DATE TRUST 1982-02-02

ESTABLISHED

(MM/DD/YYYY):

SPECIFY MARKET 9000000

VALUE OF ALL

ASSETS WITHIN THE

TRUST AT TIME OF

ESTABLISHMENT:

SPECIFY TYPE OF BURIAL

TRUST

ESTABLISHED:

HAVE YOU ADDED true

FUNDS TO THE

TRUST AFTER IT WAS

ESTABLISHED?:

WHEN DID YOU ADD 1985-02-01

FUNDS?

(MM/DD/YYYY):

HOW MUCH DID YOU 200.12

ADD?:

ARE YOU RECEIVING true

INCOME FROM THE

TRUST? :

HOW MUCH DO YOU 80000

RECEIVE

ANNUALLY?:

IS THE TRUST BEING true

USED TO PAY FOR

OR TO REIMBURSE

SOMEONE ELSE FOR

YOUR MEDICAL

EXPENSES?:

HOW MUCH IS BEING 123456.78

REIMBURSED

MONTHLY?:

WAS THE TRUST true

ESTABLISHED FOR A

CHILD OF THE

VETERAN WHO WAS

INCAPABLE OF SELF-

SUPPORT PRIOR TO

REACHING AGE 18?:

DO YOU HAVE ANY true
ADDITIONAL
AUTHORITY OR
CONTROL OF THE
TRUST?:

Section III: Unassociated Incomes

9. Unassociated incomes

1

SPECIFY DATE 2020-01-01
ANNUITY WAS
ESTABLISHED:
SPECIFY MARKET 1234568.89
VALUE OF ASSET AT
TIME OF ANNUITY
PURCHASE:
HAVE YOU ADDED true
FUNDS TO THE
ANNUITY IN THE
CURRENT OR PRIOR
THREE YEARS?:
WHEN DID YOU ADD 2022-02-02
FUNDS?:
HOW MUCH DID YOU 2222222.22
ADD?:
IS THE ANNUITY true
REVOCABLE OR
IRREVOCABLE?:
DO YOU RECEIVE true
INCOME FROM THE
ANNUNTY?:
IF YES IN 9H, 1222333.44
PROVIDE ANNUAL
AMOUNT RECEIVED:
CAN THE ANNUITY true
BE LIQUIDATED?:
IF YES IN 9J, 5666777.88
PROVIDE THE
SURRENDER VALUE:

2

SPECIFY DATE 1920-01-01

ANNUITY WAS

ESTABLISHED:

SPECIFY MARKET 123.45

VALUE OF ASSET AT

TIME OF ANNUITY

PURCHASE:

HAVE YOU ADDED false

FUNDS TO THE

ANNUITY IN THE

CURRENT OR PRIOR

THREE YEARS?:

IS THE ANNUITY false

REVOCABLE OR

IRREVOCABLE?:

DO YOU RECEIVE false

INCOME FROM THE

ANNUITY?:

CAN THE ANNUITY false

BE LIQUIDATED?:

Section IV: Associated Incomes

10. Associated incomes

1

SPECIFY ASSET VETERAN

OWNER'S

RELATIONSHIP TO

THE VETERAN:

SPECIFY TYPE OF Cash

ASSET (Cash, art,

etc.):

SPECIFY VALUE OF 11222333.44

YOUR PORTION OF

THE PROPERTY:

SPECIFY ASSET Financial institution

LOCATION (Financial

institution, property

address, etc.):

2

SPECIFY ASSET SPOUSE

OWNER'S

RELATIONSHIP TO

THE VETERAN:

SPECIFY TYPE OF Art

ASSET (Cash, art,
etc.):

SPECIFY VALUE OF 123.45

YOUR PORTION OF

THE PROPERTY:

SPECIFY ASSET 123 Main St

LOCATION (Financial
institution, property
address, etc.):

3

SPECIFY ASSET CHILD

OWNER'S

RELATIONSHIP TO

THE VETERAN:

SPECIFY TYPE OF Coins

ASSET (Cash, art,
etc.):

SPECIFY VALUE OF 10

YOUR PORTION OF

THE PROPERTY:

SPECIFY ASSET 123 Main St

LOCATION (Financial
institution, property
address, etc.):

4

SPECIFY ASSET PARENT

OWNER'S

RELATIONSHIP TO

THE VETERAN:

SPECIFY TYPE OF Chandelier

ASSET (Cash, art,
etc.):

SPECIFY VALUE OF 2000

YOUR PORTION OF

THE PROPERTY:

SPECIFY ASSET 123 Main St

LOCATION (Financial
institution, property
address, etc.):

5

SPECIFY ASSET OTHER

OWNER'S

RELATIONSHIP TO

THE VETERAN:

SPECIFY TYPE OF Eggs

ASSET (Cash, art,
etc.):

SPECIFY VALUE OF 2345.67

YOUR PORTION OF

THE PROPERTY:

SPECIFY ASSET Henhouse

LOCATION (Financial
institution, property
address, etc.):

Section V: Owned Assets

11. Owned assets*1*

SPECIFY INCOME OTHER
RECIPIENT'S
RELATIONSHIP TO
VETERAN:

SPECIFY INCOME Sibling
RECIPIENT'S
RELATIONSHIP TO
VETERAN (OTHER):

SPECIFY NAME OF John Smith
INCOME RECIPIENT
(Only needed if
Custodian of child,
child, parent, or
other):

SPECIFY INCOME Banking America
PAYER (Name of
business, financial
institution, etc.):

SPECIFY TYPE OF Dividends
INCOME RECEIVED
(Interest, dividends,
etc.):

SPECIFY FREQUENCYONE_TIME
OF INCOME
RECEIVED:

DATE INCOME LAST 01/01/2022
PAID (MM/DD/YYYY):

WHAT WAS THE 123456.78
GROSS ANNUAL
AMOUNT REPORTED
TO THE IRS?:

2

SPECIFY INCOME CUSTODIAN

RECIPIENT'S

RELATIONSHIP TO

VETERAN:

SPECIFY NAME OF Brandon Johnson

INCOME RECIPIENT

(Only needed if

Custodian of child,

child, parent, or

other):

SPECIFY INCOME George Smith

PAYER (Name of

business, financial

institution, etc.):

SPECIFY TYPE OF Interest

INCOME RECEIVED

(Interest, dividends,

etc.):

SPECIFY FREQUENCYIRREGULAR

OF INCOME

RECEIVED:

DATE INCOME LAST 05/01/2000

PAID (MM/DD/YYYY):

WHAT WAS THE 200000

GROSS ANNUAL

AMOUNT REPORTED

TO THE IRS?:

3

SPECIFY INCOME VETERAN

RECIPIENT'S

RELATIONSHIP TO

VETERAN:

SPECIFY INCOME Banking America

PAYER (Name of
business, financial
institution, etc.):

SPECIFY TYPE OF Payments

INCOME RECEIVED

(Interest, dividends,
etc.):SPECIFY FREQUENCYRECURRING
OF INCOME

RECEIVED:

DATE INCOME LAST 05/01/1920

PAID (MM/DD/YYYY):

WHAT WAS THE 123.45

GROSS ANNUAL

AMOUNT REPORTED

TO THE IRS?:

Section VI: Royalties and Other Properties

12. Royalties and other properties*1*

SPECIFY INCOME CUSTODIAN

RECIPIENT'S

RELATIONSHIP TO

VETERAN:

SPECIFY NAME OF George Bankman

INCOME RECIPIENT

(Only needed if

Custodian of child,

child, parent, or

other):

SPECIFY INCOME Bank of America

PAYER (Name of

business, financial

institution, etc.):

IF THE INCOME 123567.9

RESUMES, WHAT

AMOUNT DO YOU

EXPECT TO

RECEIVE?:

DATE PAYMENTS 04/01/2026

WILL RESUME

(MM/DD/YYYY):

This income will not NO

resume:

WAIVED GROSS 123456.78

MONTHLY INCOME:

2

SPECIFY INCOME PARENT

RECIPIENT'S

RELATIONSHIP TO

VETERAN:

SPECIFY NAME OF John Smith

INCOME RECIPIENT

(Only needed if

Custodian of child,

child, parent, or

other):

SPECIFY INCOME Bank of America

PAYER (Name of

business, financial

institution, etc.):

This income will not YES

resume:

WAIVED GROSS 100

MONTHLY INCOME:

3

SPECIFY INCOME VETERAN

RECIPIENT'S

RELATIONSHIP TO

VETERAN:

SPECIFY INCOME Banking Place

PAYER (Name of

business, financial

institution, etc.):

This income will not YES

resume:

WAIVED GROSS 222.22

MONTHLY INCOME: