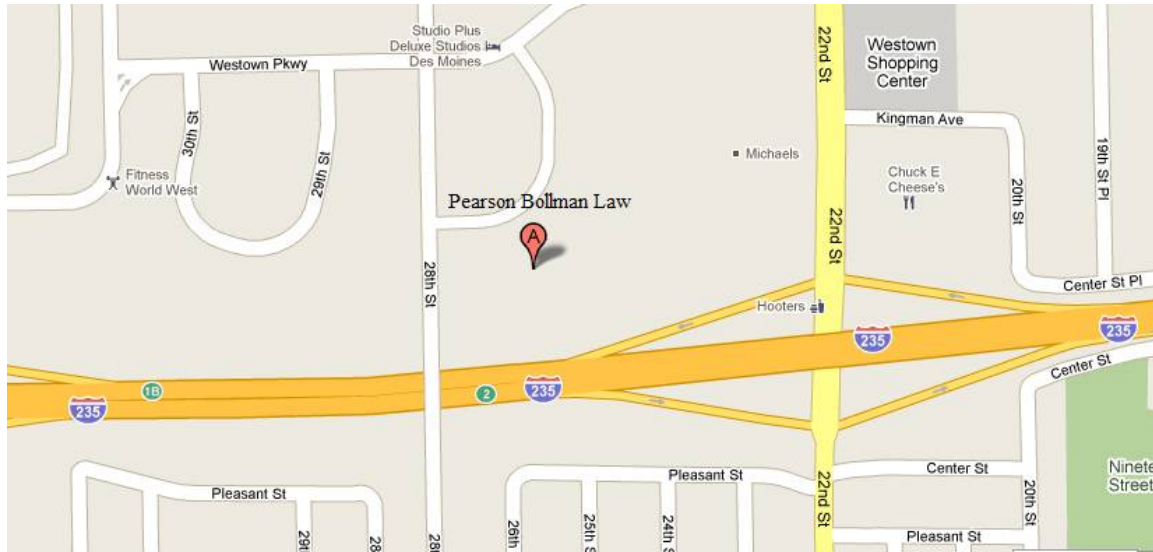




- i Certified copy of DD214 (discharge papers)
- i Birth certificate – for both spouses if married
- i Death certificate – if spouse deceased
- i Marriage/divorce certificates – for both spouses
- i Voided check for deposit of VA pension
- i List of all current medications
- i Documentation of all assets
 - o Insurance policies, if any, including life insurance policies, annuity contracts, long term care policies (we need cash value amounts, not death benefit amounts on these policies)
 - o Cash, bank accounts, CDs
 - o IRA, Keogh, and 401k accounts
 - o Stocks, bonds, mutual funds
 - o Value of business assets
 - o Real property (not your home)
 - o All other property
- i Documentation of all income
 - o Social security
 - o US Civil Service
 - o US Railroad Retirement
 - o Military Retirement
 - o SSI/Public Assistance
 - o All other income
- i Documentation of all medical expenses
 - o Medicare Part B supplemental insurance
 - o Medicare Part C advantage plan
 - o Medicare Part D
 - o Prescriptions
 - o Nursing home, assisted living, or home care
 - o All other medical expenses
- i Care facility letter if living in skilled nursing care or assisted living
- i Current Will and/or Powers of attorney

DIRECTIONS TO OFFICE

From I-235, take the 22nd Street Exit in West Des Moines, turn right on 22nd St, turn left on Westtown Parkway, turn left on 28th Street, turn left at second driveway on the left. Pearson Bollman Law is located in the Century II Building, Suite 160.



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