Veteran Planning Checklist

*What Every Veteran, their Spouse, & Children Should Have*
Legal Help For Veterans, PLLC is a law firm dedicated to assisting our Nation’s veterans receive the veterans disability compensation to which they are entitled based on their service to the country.

The law firm has been assisting veterans since 1998. Our legal staff has decades of experience in dealing with medical disability matters and employs a network of medical specialists, many former military physicians, who can insure your claim has the best likelihood of success. Our staff includes former officers and enlisted personnel, health care professionals, and dedicated individuals.

We have an acclaimed national practice representing veterans from across the country. This representation occurs at the United States Court of Appeals for Veteran Claims, the Board of Veteran Appeals, and the regional offices throughout the country.

Over the years, Legal Help For Veterans has become a trusted name in the legal community for providing services to veterans. Our lawyers are regularly asked by law schools, bar associations, and veterans’ service organizations to lecture and train others to practice in this area.

Brigadier General Carol Ann Fausone (ret.) served for 36 years with the U.S. Air Force and Michigan National Guard. As a nurse, her duty assignments took her around the country, and the world, assisting commanders with troop readiness.
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Navigating the VA

Navigating through the Department of Veterans Affairs (VA) can be a daunting task for any Veteran and their family. The time when a Veteran is in need of medical assistance, end-of-life care, or after a Veteran has passed away can be especially traumatic and hectic for spouses, children, and other family. This makes it more difficult to think about the logistical tasks associated with these stressful times.

Think about VA as having three different buildings: Benefits, Health Care, and the National Cemetery. You have to get in the correct building to find what services you need.

This e-book is meant to serve as a “preparation checklist” and lay out the most critical pieces of paperwork and information you will need to make it easier on the family at the later stages in life, or after a Veteran’s or a spouse’s passing. It will cover topics ranging from VA Life Insurance, to spousal benefits and reimbursement of burial expenses, and more.
Paperwork & Veteran Information You Will Need

On the next page is a worksheet from our sister company, The Veteran Advocate, LLC, run by Brigadier General Carol Ann Fausone (ret.). The worksheet contains a complete list of everything you might need, whether it is to receive benefits as a Veteran, ensure spousal or family benefits before or after a Veteran or spouse dies, or to get a variety of burial benefits.*

The DD214, marriage certificate (if married), and death certificate (if the Veteran has passed) are of critical importance. Please feel free to print the checklist on the next page as a guide.

*For a more in-depth look at burial benefits and Aid & Attendance and Pension benefits, check out LHFV’s website, www.LegalHelpForVeterans.com/ebooks.
### VETERAN INFORMATION

**VETERAN NAME:**

**Veteran’s DOB:**

**Address:**

**Telephone Number:**

**Social Security #:**

**Spouse’s Name & DOB:**

<table>
<thead>
<tr>
<th>Is someone other than Veteran inquiring?</th>
<th>NAME &amp; CONTACT # &amp; RELATIONSHIP</th>
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### CHECKLIST

- [ ] Branch of Service: *(Army, Marine, Navy, Air Force Coast Guard)*
- [ ] Years of Service: *(Please List YYYY-YYYY, Month if known)*
- [ ] Status: *(Active Duty, Guard, Reservists)*
- [ ] Does Veteran have DD214?
- [ ] Was Veteran “boots on the ground”? War time era? *(List era if known)*
- [ ] Marriage Certificate?
- [ ] Death certificate?
- [ ] Does Veteran have a disability claim and pension with the VA?
- [ ] If YES, what is the % disability rating?
- [ ] Is Veteran enrolled in the VA Medical System?
- [ ] Medical Needs/Diagnosis:
- [ ] Comments:
The DD214

The DD214 is a document that contains a Veteran’s separation/discharge documents issued upon a military service member’s retirement, separation, or discharge from active-duty. Generally, you need to be discharged under other-than-dishonorable conditions to receive VA benefits. However, some veterans may now be eligible to upgrade their discharge status if they were discharged under other-than-honorable circumstances and that discharge was due to PTSD (Post Traumatic Stress Disorder) symptoms.

I need to replace or obtain my DD214. How do I do that?

If you need to replace or obtain your DD214, contact the National Personal Records Center:

National Personal Records Center
www.archives.gov/st-louis

9700 Page Ave.
St. Louis, MO 63132
(314) 801-0800
(314) 801-9049 (fax)
Corrections to Military Records and Upgrade of Discharges

As stated previously, some veterans may now be eligible to upgrade their discharge status if they were discharged under other-than-honorable circumstances and that discharge was due to PTSD (Post Traumatic Stress Disorder) symptoms. This applies to all Veterans who have served in combat, including the most recent conflicts in the Middle East.

Correcting your records can be a lengthy process. You and/or your family should ensure that you have obtained all medical documentation (especially for cases involving PTSD diagnoses) that could be required for this process. Few Veteran Service Organizations, and not many law firms, will assist in discharge upgrades, so you will likely do this on your own.

Veterans can apply for a review of their discharge; or, if the Veteran is deceased or incompetent, the surviving spouse, next of kin, or legal representative may apply. See the next page for more information on the proper forms to complete.
Veterans looking to apply to upgrade their discharge status could fill out one of two forms — DD149 or DD293. Which should you use?

**DD149, “Application for Correction of Military Record”** - When to complete this form
- To apply for a correction to an error or injustice in your military record.
- To apply to upgrade your discharge status if your discharge was over 15 years ago, or for discharges issued by a court-martial.
- DD Form 149 can be downloaded and printed online at: [www.dtic.mil/whs/directives/forms/eforms/dd0149.pdf](http://www.dtic.mil/whs/directives/forms/eforms/dd0149.pdf)
- Once completed, mail the form to the appropriate service branch (addresses are listed on the form).

**DD293, “Application for the Review of Discharge from the Armed Forces of the United States”** - When to complete this form
- To apply to upgrade your discharge status if your discharge was less than 15 years ago.
- The review board has no authority to review medical discharges, and the review board cannot correct or modify discharges or dismissals issued by a court-martial.
- DD Form 293 can be downloaded and printed online at: [www.dtic.mil/whs/directives/forms/eforms/dd0293.pdf](http://www.dtic.mil/whs/directives/forms/eforms/dd0293.pdf)
- Once completed, mail the form to the appropriate service branch (addresses are listed on the form).
VA offers several life insurance programs, which were developed to provide financial security for service members’ families given the extraordinary risks involved with serving the country. If you are currently in the service or have a family member in the service, it is strongly recommended that you look into these offerings.

You can learn more about the six life insurance policy options, eligibility, and how to enroll at [www.benefits.va.gov/insurance](http://www.benefits.va.gov/insurance), or by calling 1-800-669-8477.

An important note: if a Veteran in your family has died, you should call the 1-800 number above to check whether or not the Veteran had a life insurance policy. It is not uncommon for a Veteran to not inform their family that they obtained a VA life insurance policy, and your remaining family could be entitled to substantial financial benefits from the policy — sometimes in amounts upwards of $100,000 or more.
Q: **Who is eligible for burial benefits?**
A: Veterans who were discharged under other-than-dishonorable conditions, and their spouse and dependent children.

Q: **What can be reimbursed?**
A: VA will pay a burial allowance for Veterans who, at the time of death, were entitled to receive a pension or compensation or would have been entitled to compensation if they weren’t receiving military retirement pay. VA will pay a burial allowance of up to $2,000 if the Veteran’s death was service-connected, and pay the cost to transport Veteran’s remains. In service-connected cases, the person who bore the burial expenses may claim reimbursement from VA.

Q: **Who do I call for more info on burial and memorial benefits?**
A: Call the VA National Cemetery Administration at 1-800-697-6947, or visit them on the web at [www.cem.va.gov](http://www.cem.va.gov). Your funeral director may also be able to assist with arrangements and coordinating with the VA.

For in-depth details on what can be included in a Veteran’s funeral, see our e-book on Last Respect to a Veteran at: [www.LegalHelpForVeterans.com/ebooks](http://www.LegalHelpForVeterans.com/ebooks).
Wills and trusts are not just for the wealthy. Veterans in particular may have medals and/or military decorations, memorabilia, and other personal property to pass on to their family. Such end of life planning documents can help eliminate potential family conflict, and it can clear up funeral arrangements, protect your digital assets (email accounts, passwords, etc.), and allocation of property in advance of a Veteran’s passing.

In addition, a medical power of attorney or a living will can help with decisions on medical treatments before a potential medical emergency happens. All these end of life planning documents can help reduce the stress in what is already a highly stressful time by making what can be emotional decisions ahead of time, in a less emotional state.

If you need help with any of these documents, talk to your local attorney or bar association.
“It is our duty to protect those who protect us.”

- Brigadier General Carol Ann Fausone (ret.)