

PENSION CHECK LIST

2024

Wartime Veteran Pension for Veteran or Survivor

Income/ Needs-Based Benefit

- Check war time service:
 - Not a Dishonorable discharge and served at least 1 day during a war time period
 - *90 days AD on or before 09/07/1980*
 - *24 months AD after 09/07/1980 OR full period where called/ordered to AD*

Eligible Wartime Periods

World War II (December 7, 1941, to December 31, 1946)

Korean conflict (June 27, 1950, to January 31, 1955)

Vietnam War era for Veterans who served in the Republic of Vietnam

(November 1, 1955, to May 7, 1975)

Vietnam War era for Veterans who served outside the Republic of Vietnam

(August 5, 1964, to May 7, 1975)

Gulf War (August 2, 1990 - through a future date

to be set by law or presidential proclamation)

- Veteran only- Age 65 or totally disabled by social security or VA standards
- Survivor only- Unmarried
- Net worth below \$155,356
- Assess level of need
 - Standard – able to do all ADLs and leave the house unassisted.
 - Housebound – unable to leave home without assistance.
 - Aid & Attendance (doctor must fill out 21-2680 and show need)
- Go over MAPR based on level of need in the chart attached.
- If all checks out, move on to the VA form 21P-527EZ (Veteran) or 21P-534EZ (Survivor)

ALF or In Home Aids will need:

- ALF worksheet or in home aid worksheet (last two pages of 527EZ/534EZ)
- Invoice from ALF or in home aid – even if it's a family member have them create one in a word document.
- If receiving In-home care or in an ALF, veteran or survivor's physician will need to complete Form 21-2680
- Nursing homes need to complete Form 21-0779

A&A – Aid and Attendance **ALF** – Assisted Living Facility **ADL**- Activities of Daily Living

MAPR – Maximum Annual Pension Rate **ITF** – Intent to File **AD** – Active Duty

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THINGS TO REMEMBER

- Remember to talk about **medical expenses** to bring the families income down. VA will only pay up to the MAPR, not a penny more.
- Most common monthly medical expenses– ALF, In Home Aids, Supplemental Insurance monthly payments, Medicare payments
- Independent Living does NOT count as a medical expense –Special add-ons to help with the claimant’s ADLs may be considered.
- A family member can be a paid in-home aid – **spouse cannot be a paid aid.**
- Medical expenses can go back to the ITF date – prescriptions and other non-reoccurring won’t count until already approved for the benefit.
- All income is based on household income.
- VA does a 3 year look back on transfer of assets.
- If Medicaid is approved, then the Pension benefit will drop to \$90 a month.

Pension Income and Net Worth Formula

Total Annual Family **Income** From All Sources - Annual **Medical Expenses**

(Remember: Subtract the 5% MAPR from total Medical Expenses *first*)

= Annual **Income for VA Purposes (IVAP)**

Remember: The **IVAP** cannot exceed the Maximum Annual Pension Rate (MAPR)

Assets + IVAP

= **Net Worth** (cannot exceed Net Worth Limit)

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Appendix

MAPR Based of Level of Need

Veteran		
Maximum Annual Pension Rate (MAPR) NO DEPENDENTS	Annual Amount	Monthly Amount
Standard	\$16,551	\$1,379.00
Housebound	\$20,226	\$1,685.00
Aid and Attendance	\$27,609	\$2,300.00
ONE DEPENDENT (Spouse or Child)		
Standard	\$21,674	\$1,806.00
Housebound	\$25,348	\$2,112.00
Aid and Attendance	\$32,729	\$2,727.00
Surviving Spouse/ Child		
Maximum Annual Pension Rate (MAPR) NO DEPENDENTS	Annual Amount	Monthly Amount
Standard	\$11,102	\$925
Housebound	\$13,568	\$1,131
Aid and Attendance	\$17,743	\$1,479
ONE DEPENDENT (Spouse or Child)		
Standard	\$14,529	\$1,211
Housebound	\$16,989	\$1,416
Aid and Attendance	\$21,166	\$1,764

Medical Expense 5% of MAPR

Standard Veteran	\$827
Standard Veteran with 1 Dependent	\$1083
Standard Survivor	\$555
Standard Survivor with 1 Dependent	\$726