

Veteran's Benefits Basics 2020 updated 12/1/19 (when 2020 changes go into effect)

IMPROVED PENSION HOUSEBOUND OR AID & ATTENDANCE

VETERAN/SPOUSE:

- Must be permanently and totally disabled, or age 65+
- Disability does not have to be related to military duty (this is a non-service connected pension)
- Veteran must have served on active duty at least 90 consecutive days, and at least 1 day during a "period of war" (no requirement of being in the theatre of war)
- Discharge cannot have been dishonorable
- Surviving spouse qualifies based on veteran's service record

OFFICIAL DATES FOR PERIODS OF WAR FOR NON-SERVICE CONNECTED PENSIONS:

- WWI: 4/6/17 – 11/11/18 (if in Russia, end date is 4/1/20)
- WWII: 12/7/41 – 12/31/46 (end date for Merchant Marines 8/15/45)
- Korea 6/27/50 – 1/31/55
- Vietnam 8/5/64 – 5/7/75 (start date of 2/28/61 for vets who served "in country" which would include a layover! before 8/5/64)
- Persian Gulf 8/2/90 – present

NEED & INCOME/ASSET CRITERIA

- Pension is needs based
- Analysis must be done to see the extent of the need for assistance for qualifying.
- In order to qualify for higher benefit amounts, a qualifying medical diagnosis affecting activities of daily living (ADLs) must be obtained
- Eligibility for benefits determined by analysis of income vs. cost of care
- Specific asset limits (\$127,061 in 2019, projected to be \$129,094 in 2020), BUT there are safe solutions and acceptable planning techniques to protect assets and qualify for this important benefit
- NEW: Penalty for certain asset transfers made after 10/18/18. Three year "look back period".

MAXIMUM PENSION RATES FOR "AID & ATTENDANCE"

NON-SERVICE CONNECTED CLAIMS effective 12/1/19 (when new numbers for 2020 go into effect):

<u>Type of Claim:</u>	Maximum Annual Rate	Maximum Monthly Rate
<u>Veteran:</u>		
Aid and Attendance Veteran, Single	\$22,938.00	\$1,911.50
Aid and Attendance Veteran, Married	\$27,194.00	\$2,266.17
<small>(Note: benefit amounts will be higher for veterans who are married to veterans)</small>		
<u>Surviving Spouse of a Veteran:</u>		
Aid and Attendance Surviving Spouse, No Dependents	\$14,761.00	\$1,230.08

*Benefit amounts will be lower if veteran qualifies only for "housebound" or "basic" pensions only.

If you think you or a family member or client may qualify for this important benefit, call our office for an evaluation.

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The above information is meant only to provide general information and should not be considered legal advice.