



# Pension & Fiduciary

## Veterans Non-Service-Connected Pension and Survivors Pension

Pension is a needs-based benefit designed to provide certain wartime Veterans and their survivors with a minimum level of income that raises their standard of living.

Wartime Veterans who are age 65 or older or have a permanent and total non-service-connected disability, and who have limited income and net worth may be eligible. Veterans who are more seriously disabled may qualify for pension at the increased housebound or aid and attendance (A&A) rates. Surviving spouses and dependent children of deceased wartime Veterans are eligible for monthly pension benefits if they meet the net worth and income requirements.

## The Fiduciary Program

The Fiduciary program provides oversight for VA's most vulnerable beneficiaries who are unable to manage their own VA benefits. Upon appointment by VA, a fiduciary is authorized to receive direct payment of a beneficiary's VA benefits and to disburse funds to creditors and the beneficiary according to the best interests of the beneficiary.

**3 Pension Management Centers**  
**239,114 Veterans and**  
**170,037 Survivors**  
**Receive Pension**  
**Benefits**

### A note on the data:

**The 2019 Annual Benefits Report is based on data from the VBA corporate database.**

**The availability of gender and age data is limited as some records have no gender or birthdate available. Those records are accounted for in the totals for each table but not in the category columns. Please see footnotes for additional information.**

**The Old Law Pension Program and Section 306 Pension Program are closed to new applicants. The term "Other Pension" is used to reference them.**

**Please see the section on page 2: "A Note on How the FY 2019 Pension Data is Presented" for important information on the color coding of the data tables.**

**Data regarding the fiduciaries of Veterans and survivors receiving VA benefit payments are stored in the Beneficiary Fiduciary Field System (BFFS) while data regarding claims, benefit types and award amounts for fiduciary related records are stored in the VBA corporate database.**

**Information on the fiduciary program begins on page [20](#).**



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## A Note on How the FY 2019 Pension Data is Presented

### New to the Rolls

Individuals who began receiving pension during fiscal year 2019 (October 1, 2018 to September 30, 2019) are considered “new to the rolls” and the tables are outlined in purple.

### On the Rolls

All individuals who are receiving pension on September 30, 2019 are considered “on the rolls” and are outlined in tan.

These tables include “new to the rolls” recipients.

The Office of Performance Analysis and Integrity is available to answer questions regarding the data contained in this report by email at PAI.VBACO@va.gov.

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**Release history**

<b>Version &amp; Changes</b>	<b>Date</b>
Data as of	09/30/2019



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## Pension Programs

### Pension Benefits for Veterans

Wartime Veterans who meet one or more of the following basic eligibility criteria may be entitled to pension benefits:

- Permanent and total disability from non-service-connected causes. Veterans are considered permanently and totally disabled if they are:
  - A patient in a nursing home, or
  - In receipt of Social Security disability benefits, or
  - Unemployable due to disability as determined by VA.
- 65 years of age or older

Entitlement is subject to income and net worth limitations. Additional amounts may be paid to Veterans who have dependents or who, due to disability, are in need of the aid and attendance (A&A) of another person or are housebound.

### Pension Benefits for Surviving Spouses

Surviving spouses of wartime Veterans have basic eligibility for survivors pension if they meet the income and net worth limitations. Additional amounts may be paid to surviving spouses who have dependents or who, due to disability, are in need of A&A of another person or are housebound.

### Pension Benefits for Surviving Children

Surviving children of wartime Veterans have basic eligibility for survivors pension if they meet income and net worth limitations and are:

- Unmarried, and
  - Under the age of 18 years, or
  - Between the age of 18 and 23 years and attending an accredited school, or
  - Became permanently incapable of self-support prior to reaching 18 years of age.



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## Special Monthly Pension: Aid and Attendance and Housebound

Veterans and survivors who need the A&A of another person or are housebound may be eligible for additional amounts of pension called special monthly pension. Because pension at the A&A and housebound rates is based upon a higher income limit, claimants ineligible for basic pension due to excessive income may be eligible for pension benefits if they are determined to need A&A or are housebound.

### Aid and Attendance (A&A)

- Veterans or surviving spouses may be eligible for pension at the A&A rate if:
  - They require the assistance of another person in order to perform activities of daily living, such as bathing, feeding, dressing, toileting, adjusting prosthetic devices, or protecting themselves from the hazards of their daily environment,  
or
  - They are bedridden, in that their disability or disabilities require that they remain in bed apart from any prescribed course of convalescence or treatment,  
or
  - They are a patient in a nursing home due to mental or physical incapacity,  
or
  - They have corrected visual acuity of 5/200 or less in both eyes, or concentric contraction of the visual field to 5 degrees or less.

### Housebound

- Veterans may be eligible for pension at the housebound rate if:
  - They have a single permanent disability evaluated as 100-percent disabling and,  
or
  - Due to a disability or disabilities, they are permanently and substantially confined to their immediate premises,  
or
  - They have a single permanent disability evaluated as 100-percent disabling and another disability or disabilities, independently evaluated as 60-percent or more disabling.
- Surviving spouses may be eligible for pension at the housebound rate if disability or disabilities permanently and substantially confine them to their immediate premises.

### Old Law and Section 306 Pension

Old Law and Section 306 Pension for Veterans and their surviving spouses and children use laws and regulations different from the current pension program to determine entitlement and the amount of monthly benefits. VA does not accept any new applications for benefits under these older programs. If a beneficiary loses entitlement to Old Law or Section 306 Pension due to changes in circumstances (for example, a change in income), the beneficiary must establish entitlement under the rules of the current Veterans pension or survivors pension program.



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## Quick Reference: Recipients and Amounts by Program

### Totals – new recipients

Veterans who began receiving pension benefits	47,114
Survivors <sup>1</sup> who began receiving pension benefits	15,730
<b>Total</b>	<b>62,844</b>

### Estimated annual amounts paid – new recipients

Benefit program	Number of recipients	Estimated average individual amount paid annually	Estimated total amount paid annually
Veterans Pension	47,114	\$16,341	\$769,908,090
Survivors Pension	15,730	\$11,380	\$179,005,158
<b>Total</b>	<b>62,844</b>	<b>\$15,100</b>	<b>\$948,913,249</b>

### Totals – all recipients

Veterans receiving pension benefits	239,114
Survivors receiving pension benefits	170,037
<b>Total</b>	<b>409,151</b>

### Estimated annual amounts paid – all recipients

Benefit program	Number of recipients	Estimated average individual amount paid annually	Estimated total amount paid annually
Veterans Pension	239,114	\$12,538	\$2,998,127,132
Survivors Pension	170,037	\$8,976	\$1,526,189,198
<b>Total</b>	<b>409,151</b>	<b>\$11,058</b>	<b>\$4,524,316,330</b>

<sup>1</sup> The term “survivors” includes surviving spouses and children



## Recipients by Period of Service

### New improved pension recipients by period of service

	Pre-World War I <sup>2</sup>	World War I	World War II	Korean Conflict	Vietnam Era	Gulf War Era
Veterans Pension	N/A	N/A	19,887	16,349	9,711	1,167
Survivors Pension	3	8	8,472	4,779	2,127	341
<b>Total</b>	<b>3</b>	<b>8</b>	<b>28,359</b>	<b>21,128</b>	<b>11,838</b>	<b>1,508</b>

### All improved pension recipients by period of service

	Pre-World War I <sup>3</sup>	World War I	World War II	Korean Conflict	Vietnam Era	Gulf War Era
Veterans	N/A	N/A	26,343	43,132	151,644	17,995
Survivors	67	1,642	94,766	43,974	27,066	2,522
<b>Total</b>	<b>67</b>	<b>1,642</b>	<b>121,109</b>	<b>87,106</b>	<b>178,710</b>	<b>20,517</b>

## Recipients and Amounts by Fiscal Year

### All recipients FY 2015 to FY 2019

Benefit program	2015	2016	2017	2018	2019	% Chg. FY 2018 to 2019
Veterans Pension	295,078	288,710	276,570	260,089	239,114	-8.1%
Survivors Pension	206,375	202,975	201,433	192,823	170,037	-11.8%
<b>Total</b>	<b>501,453</b>	<b>491,685</b>	<b>478,003</b>	<b>452,912</b>	<b>409,151</b>	<b>-9.7%</b>

### All recipients estimated average individual amount paid annually FY 2015 to FY 2019

Benefit Program	2015	2016	2017	2018	2019	% Chg. FY 2018 to 2019
Veterans Pension	\$11,977	\$11,991	\$12,103	\$12,350	\$12,538	1.5%
Survivors Pension	\$7,910	\$8,138	\$8,443	\$8,800	\$8,976	2.0%
<b>Total</b>	<b>\$10,303</b>	<b>\$10,400</b>	<b>\$10,561</b>	<b>\$10,839</b>	<b>\$11,058</b>	<b>2.0%</b>

<sup>2</sup> New to the rolls survivors of pre-World War I Veterans who served in the Spanish American War (3).

<sup>3</sup> On the rolls survivors of pre-World War I Veterans who served in the Spanish American War (62), the Mexican Border War (4) the Civil War (1), and Peacetime (0).





## Veterans Pension Data

### New Veterans Pension recipients and estimated annual payments by type of pension

Type of pension	Number of Veterans	Estimated average individual amount paid annually	Estimated total amount paid annually
Other Pension <sup>4</sup>	0	NA	NA
Improved Pension	47,114	\$16,341	\$769,908,090
<b>Total</b>	<b>47,114</b>	<b>\$16,341</b>	<b>\$769,908,090</b>

### New Veterans Pension recipients and estimated annual payments by type of special monthly pension

Special monthly pension status	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
With aid and attendance (A&A)	17	<0.1%	\$16,696	\$283,824
With housebound (HB)	0	0%	0	0
Total with A&A or HB <sup>5</sup>	17	<0.1%	\$16,696	\$283,824
Total without A&A or HB	47,097	99.9%	\$16,341	\$769,624,266
<b>Total all</b>	<b>47,114</b>	<b>100%</b>	<b>\$16,341</b>	<b>\$769,908,090</b>

### New Veterans Pension recipients and estimated annual payments by gender

Gender	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male Veterans	43,160	91.6%	\$16,337	\$705,091,647
Female Veterans	1,564	3.3%	\$15,933	\$24,918,911
Gender not indicated	2,390	5.1%	\$16,694	\$39,897,532
<b>Total</b>	<b>47,114</b>	<b>100.0%</b>	<b>\$16,341</b>	<b>\$769,908,090</b>

<sup>4</sup> The "Other Pension" category groups the Old Law and Section 306 Pension programs, which are no longer open to new applicants.

<sup>5</sup> A subtotal of all beneficiaries with aid and attendance or housebound – used in all tables concerning special monthly pension.



## All Veterans Pension recipients and estimated annual payments by type of pension

Type of pension	Number of Veterans	Estimated average individual amount paid annually	Estimated total amount paid annually
Other Pension <sup>6</sup>	700	\$1,730	\$1,210,988
Improved Pension	238,414	\$12,570	\$2,996,916,144
<b>Total</b>	<b>239,114</b>	<b>\$12,538</b>	<b>\$2,998,127,132</b>

## All Veterans Pension recipients and estimated annual payments by type of special monthly pension

Special monthly pension status	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
With aid and attendance (A&A)	91,777	38.4%	\$17,653	\$1,620,142,194
With housebound (HB)	3,703	1.5%	\$10,595	\$39,232,018
Total with A&A or HB	95,480	39.9%	\$17,379	\$1,659,374,212
Total without A&A or HB	143,634	60.1%	\$9,321	\$1,338,752,920
<b>Total all</b>	<b>239,114</b>	<b>100.0%</b>	<b>\$12,538</b>	<b>\$2,998,127,132</b>

## All Veterans Pension recipients and estimated annual payments by gender

Gender	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male Veterans	221,406	92.6%	\$12,488	\$2,764,941,552
Female Veterans	10,541	4.4%	\$13,020	\$137,243,761
Gender not indicated	7,167	3.0%	\$13,387	\$95,941,820
<b>Total</b>	<b>239,114</b>	<b>100.0%</b>	<b>\$12,538</b>	<b>\$2,998,127,132</b>

<sup>6</sup> The “Other Pension” category groups the Old Law and Section 306 Pension programs, which are no longer open to new applicants.





## New Veterans Pension recipients and estimated annual payments by type of special monthly pension and gender<sup>7</sup>

	Special monthly pension status	Number of Veterans	% of gender total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male Veterans	With aid and attendance (A&A)	17	<0.1%	\$16,696	\$283,824
	With housebound (HB)	0	0%	0	0
	Total with A&A or HB	17	<0.1%	\$16,696	\$283,824
	Total without A&A or HB	43,143	99.9%	\$16,337	\$704,807,823
<b>Total</b>		<b>43,160</b>	<b>100.0%</b>	<b>\$16,337</b>	<b>\$705,091,647</b>

	Special monthly pension status	Number of Veterans	% of gender total	Estimated average individual amount paid annually	Estimated total amount paid annually
Female Veterans	With aid and attendance (A&A)	0	0	0	0
	With housebound (HB)	0	0	0	0
	Total with A&A or HB	0	0%	0	0
	Total without A&A or HB	1,564	100.0%	\$15,933	\$24,918,911
<b>Total</b>		<b>1,564</b>	<b>100.0%</b>	<b>\$15,933</b>	<b>\$24,918,911</b>

## All Veterans Pension recipients and estimated annual payments by type of special monthly pension and gender<sup>7</sup>

	Special monthly pension status	Number of Veterans	% of gender total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male Veterans	With aid and attendance (A&A)	83,632	37.8%	\$17,617	\$1,473,366,653
	With housebound (HB)	3,455	1.6%	\$10,610	\$36,657,191
	Total with A&A or HB	87,087	39.3%	\$17,339	\$1,510,023,843
	Total without A&A or HB	134,319	60.7%	\$9,343	\$1,254,917,708
<b>Total</b>		<b>221,406</b>	<b>100.0%</b>	<b>\$12,488</b>	<b>\$2,764,941,552</b>

	Special monthly pension status	Number of Veterans	% of gender total	Estimated average individual amount paid annually	Estimated total amount paid annually
Female Veterans	With aid and attendance (A&A)	4,391	41.7%	\$17,436	\$76,563,615
	With housebound (HB)	171	1.6%	\$10,568	\$1,807,184
	Total with A&A or HB	4,562	43.3%	\$17,179	\$78,370,799
	Total without A&A or HB	5,979	56.7%	\$9,847	\$58,872,962
<b>Total</b>		<b>10,541</b>	<b>100.0%</b>	<b>\$13,020</b>	<b>\$137,243,761</b>



<sup>7</sup> Certain records do not indicate gender information and are not included in the totals.



## New Veterans Pension recipients and estimated annual payments by period of service

Period of service	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
World War II	19,887	42.2%	\$18,330	\$364,531,657
Korean Conflict	16,349	34.7%	\$17,059	\$278,899,259
Vietnam Era	9,711	20.6%	\$11,520	\$111,875,313
Gulf War Era	1,167	2.5%	\$12,512	\$14,601,861
<b>Total</b>	<b>47,114</b>	<b>100.0%</b>	<b>\$16,341</b>	<b>\$769,908,090</b>

## All Veterans Pension recipients and estimated annual payments by period of service

Period of service	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
World War II	26,343	11.0%	\$17,362	\$457,359,845
Korean Conflict	43,132	18.0%	\$14,765	\$636,854,567
Vietnam Era	151,644	63.4%	\$10,928	\$1,657,187,813
Gulf War Era	17,995	7.5%	\$13,711	\$246,724,907
<b>Total</b>	<b>239,114</b>	<b>100.0%</b>	<b>\$12,538</b>	<b>\$2,998,127,132</b>

### Chart: New compared to all Veterans Pension recipients by period of service

The chart below displays the distribution of the number of Veterans by period of service. The purple bars in the top row are new recipients and the brown/tan bars on the bottom row indicate all Veterans receiving pension benefits at the end of the fiscal year.





## New Veterans Pension recipients and estimated annual payments by age

Age range	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Age 34 and under	76	0.2%	\$12,641	\$960,722
Age 35 through 64	1,962	4.2%	\$12,115	\$23,770,144
Age 65 through 74	5,609	11.9%	\$9,862	\$55,315,619
Age 75 and over	39,467	83.8%	\$17,479	\$689,861,605
<b>Total</b>	<b>47,114</b>	<b>100%</b>	<b>\$16,341</b>	<b>\$769,908,090</b>

## All Veterans Pension recipients and estimated annual payments by age

Age range	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Age 34 and under	649	0.3%	\$14,758	\$9,578,182
Age 35 through 64	41,727	17.5%	\$12,896	\$538,093,091
Age 65 through 74	106,788	44.7%	\$10,572	\$1,128,944,326
Age 75 and over	89,936	37.6%	\$14,692	\$1,321,380,530
<b>Total<sup>8</sup></b>	<b>239,114</b>	<b>100%</b>	<b>\$12,538</b>	<b>\$2,998,127,132</b>

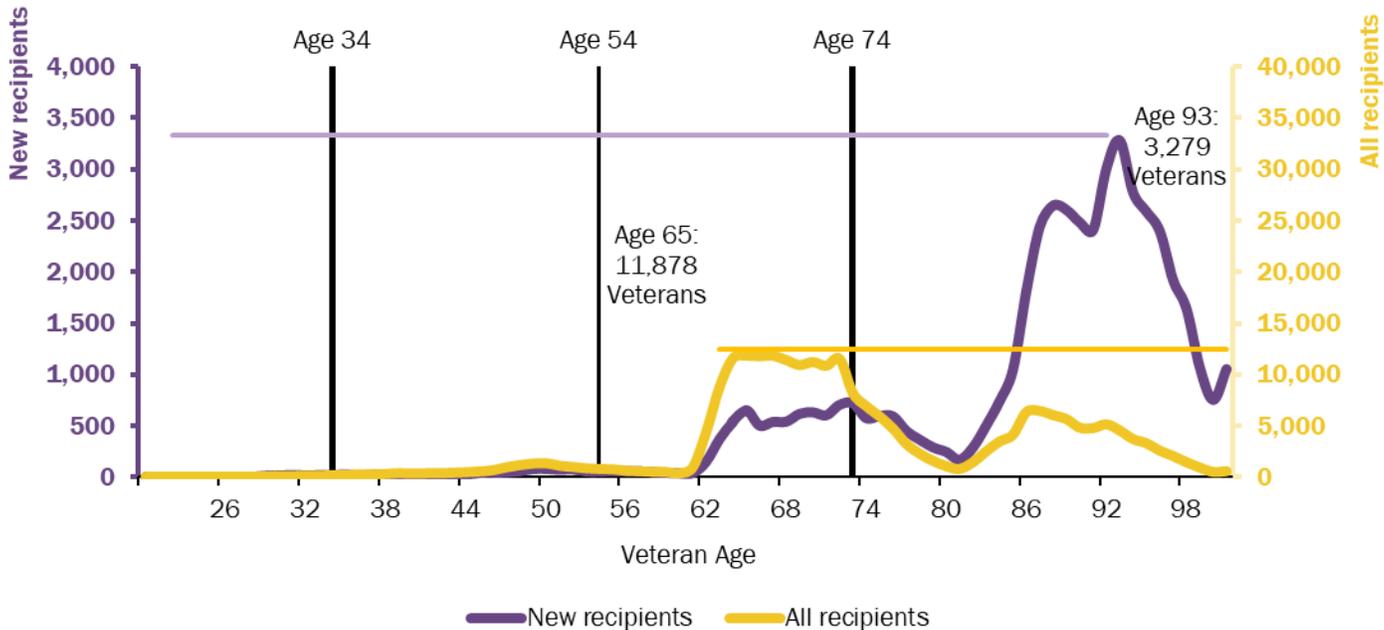


<sup>8</sup> Total includes 14 Veterans and \$131,004 in benefits with no date of birth indicated in award record.



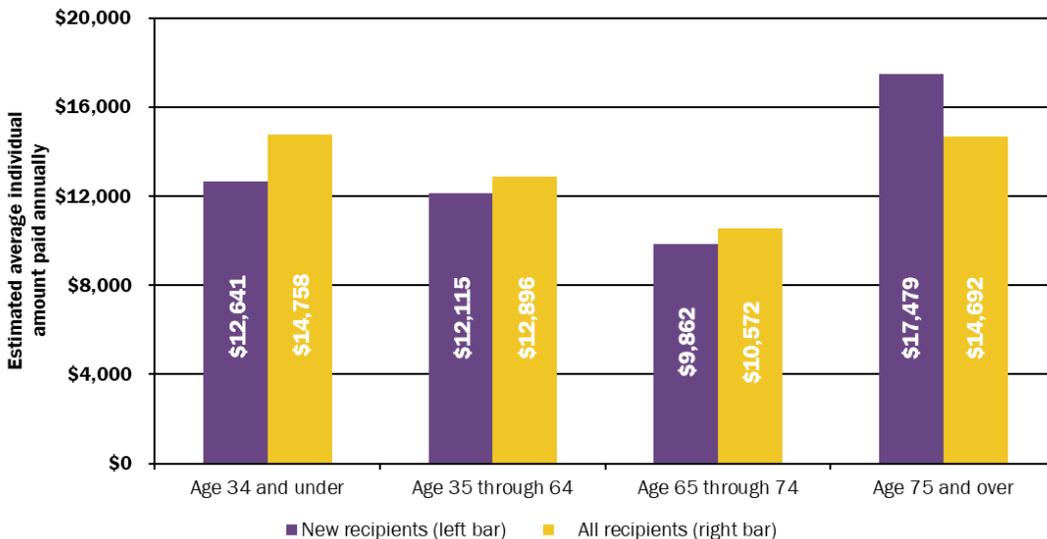
### Chart: New compared to all Veterans Pension recipients by age

The chart below displays the ages of the Veterans who began receiving benefits in FY 19 (purple line, left axis) vs. the total number of Veterans receiving benefits at the end of the fiscal year (tan line, right axis).



### Chart: New compared to all Veterans Pension recipients by estimated average individual amounts paid annually and age

The chart below displays the estimated average individual amount paid annually to Veterans who began receiving benefits in FY 19 (purple bars on the left) vs. the estimated average individual amount paid annually for all Veterans receiving benefits at the end of the fiscal year (tan bars on the right) by age group.





**New Survivors Pension recipients and estimated annual payments  
by type of pension**

Type of pension	Number of survivors	Estimated average individual amount paid annually	Estimated total amount paid annually
Other Pension <sup>10</sup>	N/A	N/A	N/A
Improved Pension	15,730	\$11,380	\$179,005,158
<b>Total</b>	<b>15,730</b>	<b>\$11,380</b>	<b>\$179,005,158</b>

**New Survivors Pension recipients and estimated annual payments  
by type of special monthly pension**

Special monthly pension status	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
With aid and attendance (A&A)	12,794	81.3%	\$12,187	\$155,924,328
With housebound (HB)	45	0.3%	\$7,761	\$349,236
Total with A&A or HB <sup>11</sup>	12,839	81.6%	\$12,172	\$156,273,564
Total without A&A or HB	2,891	18.4%	\$7,863	\$22,731,594
<b>Total all</b>	<b>15,730</b>	<b>100.0%</b>	<b>\$11,380</b>	<b>\$179,005,158</b>

**New Survivors Pension recipients and estimated annual payments  
by gender**

Gender	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male survivors	115	0.7%	\$8,933	\$1,027,332
Female survivors	13,445	85.5%	\$11,492	\$154,508,854
Gender not indicated	2,170	13.8%	\$10,815	\$23,468,972
<b>Total</b>	<b>15,730</b>	<b>100.0%</b>	<b>\$11,380</b>	<b>\$179,005,158</b>

<sup>9</sup> The term “survivors” throughout this section includes surviving spouses and children.

<sup>10</sup> The “Other Pension” category groups the Old Law and Section 306 Pension programs, which are no longer open to new applicants.

<sup>11</sup> A subtotal of all beneficiaries with aid and attendance or housebound – used in all tables concerning special monthly pension.



## All Survivors Pension recipients and estimated annual payments by type of pension

Type of pension	Number of survivors	Estimated average individual amount paid annually	Estimated total amount paid annually
Other Pension <sup>12</sup>	9,643	\$930	\$8,972,523
Improved Pension	160,394	\$9,459	\$1,517,216,675
<b>Total</b>	<b>170,037</b>	<b>\$8,976</b>	<b>\$1,526,189,198</b>

## All Survivors Pension recipients and estimated annual payments by type of special monthly pension

Special monthly pension status	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
With aid and attendance (A&A)	103,667	61.0%	\$11,306	\$1,172,028,586
With housebound (HB)	891	0.5%	\$6,201	\$5,525,219
Total with A&A or HB	104,558	61.5%	\$11,262	\$1,177,553,805
Total without A&A or HB	65,479	38.5%	\$5,324	\$348,635,393
<b>Total all</b>	<b>170,037</b>	<b>100.0%</b>	<b>\$8,976</b>	<b>\$1,526,189,198</b>

## All Survivors Pension recipients and estimated annual payments by gender

Gender	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male survivors	1,478	0.9%	\$3,724	\$5,503,694
Female survivors	127,326	74.9%	\$9,547	\$1,215,606,748
Gender not indicated	41,233	24.2%	\$7,399	\$305,078,756
<b>Total</b>	<b>170,037</b>	<b>100.0%</b>	<b>\$8,976</b>	<b>\$1,526,189,198</b>

<sup>12</sup> The "Other Pension" category groups the Old Law and Section 306 Pension programs, which are no longer open to new applicants.





## New Survivors Pension recipients and estimated annual payments by type of special monthly pension and gender<sup>13</sup>

	Special monthly pension status	Number of survivors	% of gender total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male survivors	With aid and attendance (A&A)	58	50.4%	\$11,200	\$649,572
	With housebound (HB)	1	0.9%	\$11,088	\$11,088
	<b>Total with A&amp;A or HB</b>	<b>59</b>	<b>51.3%</b>	<b>\$11,198</b>	<b>\$660,660</b>
	Total without A&A or HB	56	48.7%	\$6,548	\$366,672
	<b>Total</b>	<b>115</b>	<b>100.0%</b>	<b>\$8,933</b>	<b>\$1,027,332</b>

Female survivors	With aid and attendance (A&A)	11,082	82.4%	\$12,207	\$135,279,177
	With housebound (HB)	34	0.3%	\$7,477	\$254,232
	<b>Total with A&amp;A or HB</b>	<b>11,116</b>	<b>82.7%</b>	<b>\$12,193</b>	<b>\$135,533,409</b>
	Total without A&A or HB	2,329	17.3%	\$8,147	\$18,975,445
	<b>Total</b>	<b>13,445</b>	<b>100.0%</b>	<b>\$11,492</b>	<b>\$154,508,854</b>

## All Survivors Pension recipients and estimated annual payments by type of special monthly pension and gender<sup>13</sup>

	Special monthly pension status	Number of survivors	% of gender total	Estimated average individual amount paid annually	Estimated total amount paid annually
Male survivors	With aid and attendance (A&A)	262	17.7%	\$11,339	\$2,970,744
	With housebound (HB)	3	0.2%	\$11,088	\$33,264
	<b>Total with A&amp;A or HB</b>	<b>265</b>	<b>17.9%</b>	<b>\$11,336</b>	<b>\$3,004,008</b>
	Total without A&A or HB	1,213	82.1%	\$2,061	\$2,499,686
<b>Total</b>		<b>1,478</b>	<b>100.0%</b>	<b>\$3,724</b>	<b>\$5,503,694</b>

Female survivors	With aid and attendance (A&A)	84,524	66.4%	\$11,362	\$960,399,956
	With housebound (HB)	755	0.6%	\$6,028	\$4,550,884
	<b>Total with A&amp;A or HB</b>	<b>85,279</b>	<b>67.0%</b>	<b>\$11,315</b>	<b>\$964,950,839</b>
	Total without A&A or HB	42,047	33.0%	\$5,961	\$250,655,909
	<b>Total</b>	<b>127,326</b>	<b>100.0%</b>	<b>\$9,547</b>	<b>\$1,215,606,748</b>



<sup>13</sup> Certain records do not indicate gender information and are not included in the totals.



## New Survivors Pension recipients and estimated annual payments by period of service

Veteran's period of service	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Pre-World War I	3	<0.1%	\$7,052	\$21,156
World War I	8	0.1%	\$6,141	\$49,128
World War II	8,472	53.9%	\$12,034	\$101,951,493
Korean Conflict	4,779	30.4%	\$11,359	\$54,283,410
Vietnam Era	2,127	13.5%	\$9,483	\$20,170,811
Gulf War Era	341	2.2%	\$7,417	\$2,529,160
<b>Total</b>	<b>15,730</b>	<b>100.0%</b>	<b>\$11,380</b>	<b>\$179,005,158</b>

## All Survivors Pension recipients and estimated annual payments by period of service

Veteran's period of service	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Pre-World War I	67	<0.1%	\$3,749	\$251,208
World War I	1,642	1.0%	\$3,289	\$5,400,870
World War II	94,766	55.7%	\$9,194	\$871,293,311
Korean Conflict	43,974	25.9%	\$9,186	\$403,957,652
Vietnam Era	27,066	15.9%	\$8,309	\$224,891,107
Gulf War Era	2,522	1.5%	\$8,087	\$20,395,050
<b>Total</b>	<b>170,037</b>	<b>100.0%</b>	<b>\$8,976</b>	<b>\$1,526,189,198</b>

### Chart: New compared to all Survivors Pension recipients by Veteran's period of service<sup>14</sup>

The chart below displays the distribution of the number of survivors by the Veteran's period of service. The purple bars in the top row are new recipients and the brown/tan bars on the bottom row indicate all survivors receiving pension benefits at the end of the fiscal year.



<sup>14</sup> Survivors of Veterans of the Gulf War Era, World War I and Pre-World War I do not make up a significant enough portion of the total to be visible on the chart.





## New Survivors Pension recipients and estimated annual payments by age

Age range	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Age 17 and under	10	0.1%	\$2,038	\$20,376
Age 18 through 34	67	0.4%	\$5,239	\$351,007
Age 35 through 64	1,080	6.9%	\$7,363	\$7,952,577
Age 65 through 74	700	4.5%	\$8,070	\$5,648,860
Age 75 and over	13,871	88.2%	\$11,896	\$165,008,759
<b>Total<sup>15</sup></b>	<b>15,730</b>	<b>100%</b>	<b>\$11,380</b>	<b>\$179,005,158</b>

## All Survivors Pension recipients and estimated annual payments by age

Age range	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Age 17 and under	193	0.1%	\$6,849	\$1,321,852
Age 18 through 34	304	0.2%	\$6,472	\$1,967,638
Age 35 through 64	20,534	12.1%	\$6,955	\$142,807,843
Age 65 through 74	17,968	10.6%	\$6,109	\$109,772,869
Age 75 and over	130,798	76.9%	\$9,695	\$1,268,050,360
<b>Total<sup>16</sup></b>	<b>170,037</b>	<b>100%</b>	<b>\$8,976</b>	<b>\$1,526,189,198</b>

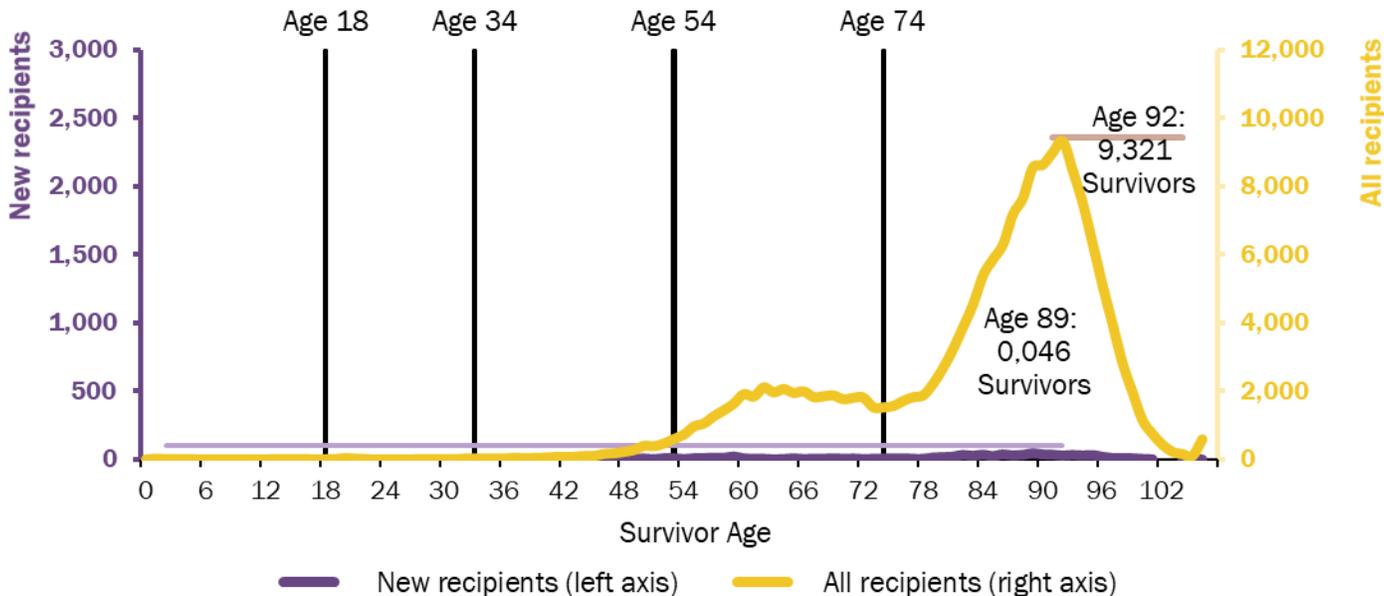
<sup>15</sup> Total includes 2 survivors and \$23,580 in benefits with no date of birth indicated in award record.

<sup>16</sup> Total includes 240 survivors and \$2,268,636 in benefits with no date of birth indicated in award record.



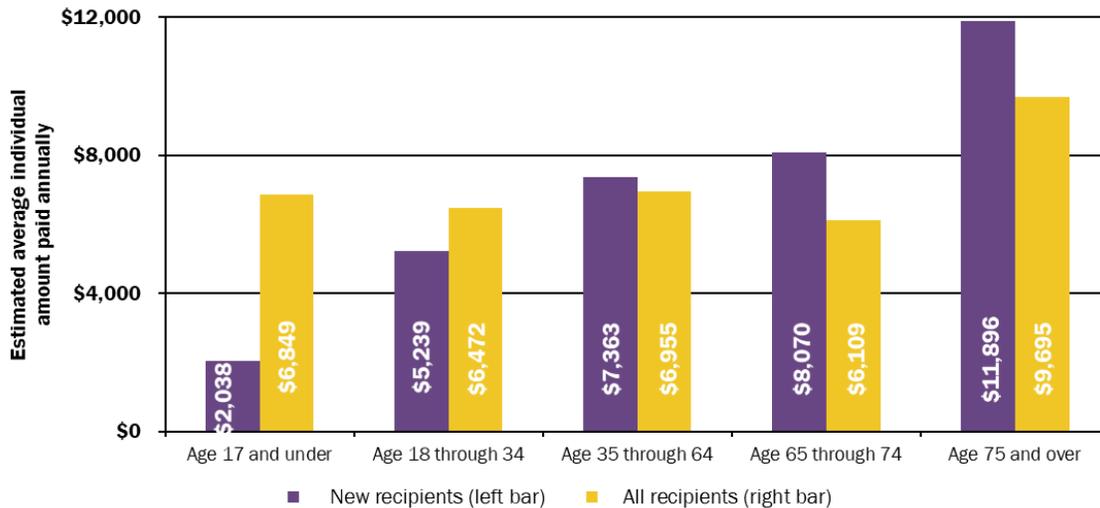
### Chart: New compared to all Survivors Pension recipients by age

The chart below displays the ages of the survivors who began receiving benefits in FY 19 (purple line, left axis) vs. the total number of survivors receiving benefits at the end of the fiscal year (tan line, right axis).



### Chart: New compared to all Survivor Pension recipients by estimated average individual amounts paid annually and age

The chart below displays the estimated average individual amount paid annually to survivors who began receiving benefits in FY 19 (purple bars on the left) vs. the estimated average individual amount paid annually for all survivors receiving benefits at the end of the fiscal year (tan bars on the right) broken down by age.



U.S. Department of Veterans Affairs  
Veterans Benefits Administration



# Fiduciary

## Purpose of the Fiduciary Program



VA's Fiduciary Program provides protection to Veterans and other beneficiaries who are unable to manage their financial affairs. Under this program, VA appoints fiduciaries to manage VA benefits and ensure the welfare and needs of beneficiaries by using the least restrictive, yet most effective payment method. The program closely monitors fiduciaries for compliance with program responsibilities to ensure that VA benefits are being used for the sole purpose of meeting the needs, security, and comfort of beneficiaries and their dependents.

Beginning with fiscal year 2019, Fiduciary Program totals represent the number of beneficiaries served during the fiscal year.

### Number of beneficiaries by beneficiary type<sup>17</sup>

Beneficiary Type	Number of Beneficiaries
Veteran	104,741
Surviving spouse	59,517
Adult disabled child	9,935
Minor child <sup>18</sup>	2,196
Dependent parent	46
Insurance	423
<b>Total<sup>19</sup></b>	<b>176,858</b>

### Amount of benefits managed by benefit type<sup>20</sup>

Benefit Paid	Estimated total amount paid annually	Estimated average individual amount paid annually
Compensation	\$2,207,943,451	\$36,891
Veterans Pension	\$611,424,360	\$17,229
Survivors Pension	\$506,951,868	\$10,260
Dependency and Indemnity Compensation	\$172,459,276	\$15,841
<b>Total</b>	<b>\$3,498,778,955</b>	

<sup>17</sup> Source: Beneficiary Fiduciary Field System

<sup>18</sup> Includes minors in receipt of one-time insurance awards due to being named a beneficiary on an insurance policy.

<sup>19</sup> Includes any beneficiary who received services from VA's fiduciary program during FY 19.

<sup>20</sup> Source: VBA corporate database



### Number of beneficiaries by fiduciary relationship<sup>17</sup>

Relationship	Number of Beneficiaries
Legal Custodian	131,397
Spouse Payee	26,511
Court Appointed Fiduciary	1,811
Supervised Direct Pay	1,623
Institutional Award	313
Custodian in Fact	10
Proposed Fiduciary <sup>21</sup>	11,927
<b>Total</b>	<b>173,592</b>

### Misuse

During fiscal year 2019, fiduciary personnel conducted 1,031 misuse investigations of which 730 fiduciaries were removed based upon a finding of misuse of benefits. Of the cases VA referred to the VA Office of the Inspector General (OIG), 25 misuse cases were accepted by OIG for further investigation.

OIG reported the following actions have been taken<sup>22</sup>:

- Investigations opened: 25
- Investigations completed and referred to prosecutor's office: 25
- Cases accepted for prosecution: 11
- Cases declined for prosecution: 9
- Cases pending: 5

The number of OIG prosecutorial outcomes during fiscal year 2019<sup>22</sup>:

- Arrests: 15
- Indictments: 18
- Convictions: 11

The amount of funds involved in OIG prosecutorial outcomes during fiscal year 2019<sup>23</sup>:

- The total amount of restitution ordered in cases arising from the misuse of benefits by a fiduciary was \$1,671,041.
- The total amount of money recovered by the government in misuse cases was \$948,142.
- The total amount of benefits reissued to beneficiaries was \$1,612,330.02.

<sup>21</sup> Includes beneficiaries awaiting the final determination of incompetency and/or the appointment of a fiduciary.

<sup>22</sup> Includes action taken by OIG on cases referred as of the end of fiscal year 2019. Figures may include cases referred during previous fiscal years.

<sup>23</sup> Source: OIG



## Appendix – Fiduciary Hub Addresses and Regional Offices Served

### Salt Lake City – UT VA Fiduciary Hub

550 Foothill Dr.  
Salt Lake City, UT 84113  
Regional offices served:

Salt Lake City	UT
Albuquerque	NM
Los Angeles	CA
Anchorage	AK
Oakland	CA
Boise	ID
Phoenix	AZ
Cheyenne	WY
Portland	OR
Denver	CO
Reno	NV
Ft. Harrison	MT
Honolulu	HI
San Diego	CA
Seattle	WA

### Lincoln – NE VA Fiduciary Hub

3800 Village Dr.  
Lincoln, NE 68516  
Regional offices served:

Lincoln	NE
Wichita	KS
Sioux Falls	SD
Muskogee	OK
Fargo	ND
Waco	TX
Houston	TX

### Milwaukee – WI VA Fiduciary Hub

5400 West National Ave.  
Milwaukee, WI 53214  
Regional offices served:

Milwaukee	WI
Little Rock	AR
Des Moines	IA
St. Louis	MO
St. Paul	MN
New Orleans	LA
Chicago	IL

### Louisville – KY VA Fiduciary Hub

321 West Main Street, Suite 390  
Louisville, KY 40202  
Regional offices served:

Louisville	KY
Roanoke	VA
Huntington	WV
Jackson	MS
Nashville	TN
Montgomery	AL
San Juan	PR

### Indianapolis – IN VA Fiduciary Hub

575 North Pennsylvania St.  
Indianapolis, IN 46204  
Regional offices served:

Indianapolis	IN
Detroit	MI
Newark	NJ
Baltimore	MD
Manchester	NH
White River	
Junction	VT
Boston	MA
Pittsburgh	PA
Philadelphia	PA
Wilmington	DE
Hartford	CT
New York	NY
Providence	RI
Buffalo	NY
Togus	ME
Cleveland	OH
Manila	PH

### Columbia – SC VA Fiduciary Hub

6437 Garners Ferry Rd.  
Columbia, SC 29209  
Regional offices served:

Columbia	SC
Winston-Salem	NC
Atlanta	GA
St. Petersburg	FL

Fiduciary Hub Call Center:

**1-888-407-0144**



U.S. Department  
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Administration



## Appendix – Pension Management Center Addresses and Regional Offices Served

### Philadelphia – PA Pension Management Center

5000 Wissahickon Ave.  
Philadelphia, PA 19144

### Milwaukee – WI Pension Management Center

5400 West National Ave.  
Milwaukee, WI 53214

### St. Paul – MN Pension Management Center

1 Federal Drive  
Fort Snelling  
St. Paul, MN 55111

**The Manila Regional Office  
processes all pension claims in  
the Philippines.**

National Pension Call Center:

**1-800-827-1000**



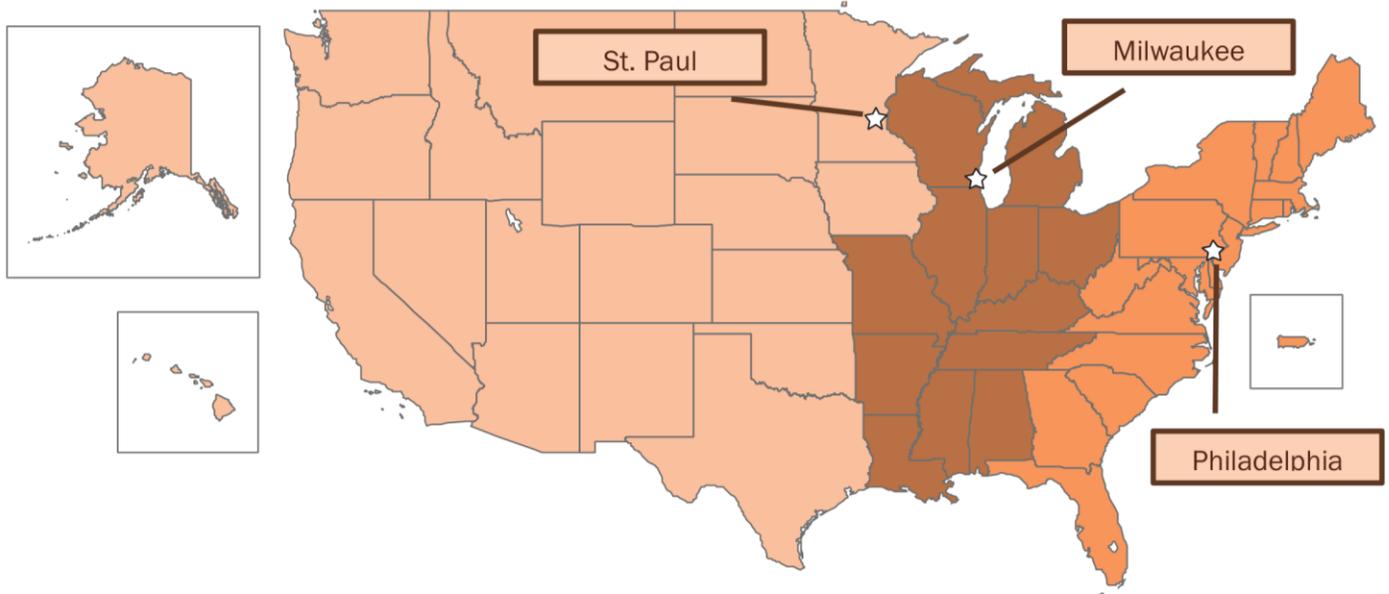
**VA**



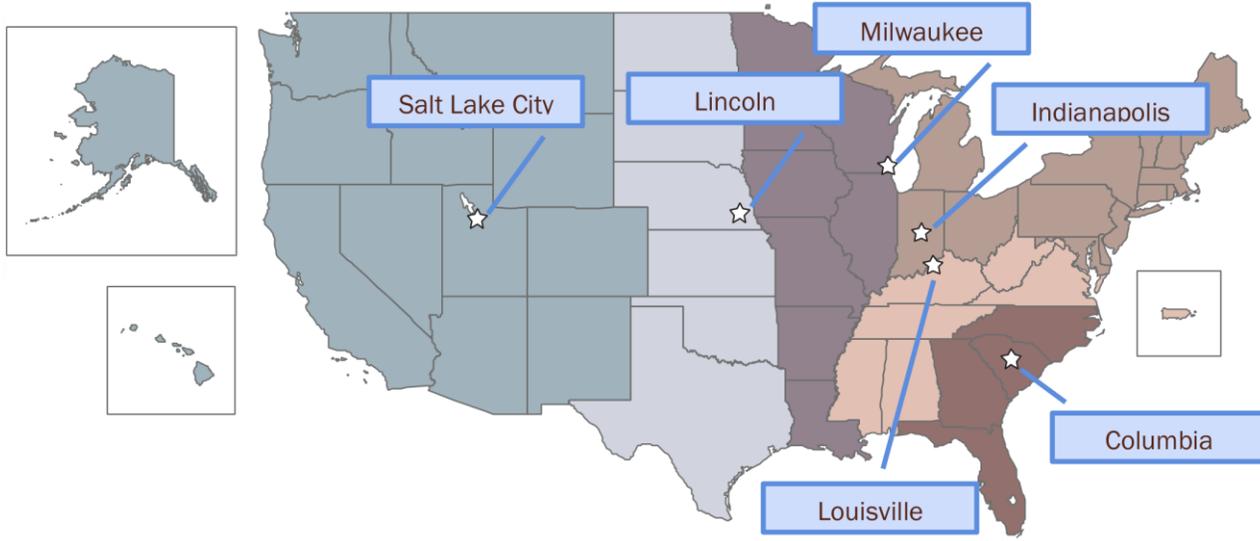
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Veterans Benefits  
Administration

# Appendix – Maps of Fiduciary Hub and Pension Management Center Jurisdiction

## Pension Management Centers



## Fiduciary Hubs



### Contact Information

Pension Information:  
**1-800-827-1000**

Fiduciary Information:  
**1-888-407-0144**

Annual Benefits Report  
(Office of Performance Analysis & Integrity)  
**202-461-9040**

Department of Veterans Affairs  
home page  
**www.va.gov**

Veterans Benefits Administration  
home page  
**benefits.va.gov**

Pension home page  
**benefits.va.gov/pension**

Fiduciary home page  
**benefits.va.gov/fiduciary**

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**www.ebenefits.va.gov**

