

PENSION ELIGIBILITY FOR ELDER WARTIME ERA VETERANS

On September 13, 2001 the VA liberalized the regulation that governs eligibility for a non-service connected pension. To be eligible for a VA pension, the veteran must have been a:

- 1) honorably discharged wartime era veteran (served 90 days, of which 1 day was during a wartime era (see sheet), and
- 2) whose annual family VA adjusted income* falls below \$9,894 (if single) or \$12,959 (if married) (see sheet if family is larger), and
- 3) with a combined income and net worth asset (cash, savings, CD's, money market, IRA's, bonds, stocks, etc) that is less then \$80,000 *** , and

are either:

- 1) 65 years old or older, or
- 2) any age, but a patient in a long-term nursing home (beyond rehabilitation treatment), or
- 3) any age, but determined by Social Security to be totally disabled (receiving SSD benefits) or,
- 4) permanently and totally disabled, and is unable to obtain sustaining employment.

If the veteran is housebound or requires the assistance of another for medical reasons the income limits are higher. (submit DOEA form 1823 or CF-MED 3008 or A&A form)

Documents and/or information needed:

- Original discharge papers (if available), copy will be accepted
- Copy of Social Security or Medicare card
- Copy of marriage license (if married)
- Copy of previous marriage and divorce certificates (or information of – who, when/where married and divorced)
- Copy of death certificate (with cause of death) for spouse (if it applies)
- Copy of birth certificates for dependent children, and children 18-23 if attending school
- List all family income (SSA, SSD, pensions, annuities, interest, dividends, etc.)
- List of all family recurring monthly medical expenses (medical insurance premiums, prescriptions – printout from pharmacy, etc.)
- Copy of Florida (Dept. of Elder Affairs) DOEA form 1823 (from ALF) ** or
- Copy of Florida (Dept. of Children and Families) CF-MED form 3008 (from Nursing Home) ** or
- A&A form (from this office) Aid and Attendance Letter form completed by Physician.
- ALF form (from this office) ..Statement of Level of Care from ALF
- Copy of SSD award letter (if receiving SSD payments)
- Emergency contact information (name, address, phone number, relationship)

*VA Adjusted Income – Overall family income minus recurring monthly medical expenses.

**DOEA form 1823/CF-MED form 3008 – If unavailable, obtain an Aid & Attendance form from this office.

***Networth – If assets (does not include a home or car) are not used for the veteran's daily maintenance, VA may define that amount as "excessive income" and deny the Pension claim, even if it is below the \$80,000.