



# Pension & Fiduciary

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

Pension are needs-based benefits designed to provide certain wartime Veterans and their survivors 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 are eligible. Veterans who are more seriously disabled may qualify for pension at the increased housebound or aid and attendance 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**  
**308,116 Veterans and**  
**210,450 Survivors**  
**Receive Pension**  
**Benefits**

### A note on the data:

**The 2013 Annual Benefits Report is based on data from the VETSNET 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 Protected or 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 2013 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 is stored in the Fiduciary Beneficiary System (FBS) while data regarding claims, benefit types and award amounts for fiduciary related records are stored in the VETSNET corporate database.**

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



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## A Note on How the FY 2013 Pension Data are Presented

Some data tables were moved, combined, or had their headings changed from previous Annual Benefits Reports. Also, there is now an organization of the data by table color:

### New To the Rolls

Individuals who began receiving pension during fiscal year 2013 (October 1, 2012 to September 30, 2013) 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, 2013 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](mailto:PAI.VBACO@va.gov).

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### Release history

Version & Changes	Date
V1.0: Initial Release	09/26/2014



**VA**



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## Pension Programs

### Pension Benefits for Veterans Based on Age or Disability

Wartime Veterans who meet the minimum income thresholds in addition to 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 for long-term care because of disability,  
or
  - In receipt of Social Security Disability Insurance,  
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 aid and attendance 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 aid and attendance 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 26 years and attending an accredited school,  
or
  - Became permanently incapable of self-support prior to reaching 18 years of age.

## Special Monthly Pension: Aid and Attendance and Housebound

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

### Aid and Attendance (A&A)

- Veterans or surviving spouses may be eligible for pension at the A&A rate if:
  - They require the aid 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 Pensions

Old Law and Section 306 Pensions for Veterans and their surviving spouses and children use laws and regulations different from Improved Pension 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 program, Improved Pension.



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## Quick Reference: Recipients and Amounts by Program

### Totals – new recipients

Veterans who began receiving pension benefits	41,076
Survivors <sup>1</sup> who began receiving pension benefits	37,400
<b>Total</b>	<b>78,476</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	41,076	\$ 12,821	\$ 526,646,845
Survivors Pension	37,400	\$ 9,430	\$ 352,688,834
<b>Total</b>	<b>78,476</b>	<b>\$ 11,205</b>	<b>\$ 879,335,679</b>

### Totals – all recipients

Veterans receiving pension benefits	308,116
Survivors receiving pension benefits	210,450
<b>Total</b>	<b>518,566</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	308,116	\$11,315	\$3,486,251,321
Survivors Pension	210,450	\$6,988	\$1,470,678,335
<b>Total</b>	<b>518,566</b>	<b>\$9,559</b>	<b>\$4,956,929,656</b>

<sup>1</sup> The term “survivors” includes surviving spouses and surviving 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			15,460	8,803	14,735	2,078
Survivors	9	49	26,522	6,869	3,621	330
<b>Total</b>	<b>9</b>	<b>49</b>	<b>41,982</b>	<b>15,672</b>	<b>18,356</b>	<b>2,408</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			70,168	57,004	167,121	13,823
Survivors	118	3,676	144,103	36,686	24,590	1,277
<b>Total</b>	<b>118</b>	<b>3,676</b>	<b>214,271</b>	<b>93,690</b>	<b>191,711</b>	<b>15,100</b>

## Recipients and Amounts by Fiscal Year

### All improved pension recipients FY 2009 to FY 2013

Benefit program	2009	2010	2011	2012	2013	% Chg. FY 2012 to 2013
Veterans Pension	314,245	313,563	313,665	314,790	308,116	-2.1%
Survivors Pension	194,103	198,832	201,955	207,453	210,450	1.4%
<b>Total</b>	<b>508,348</b>	<b>512,395</b>	<b>515,620</b>	<b>522,243</b>	<b>518,566</b>	<b>-0.7%</b>

### All improved pension estimated average individual amount paid annually FY 2009 to FY 2013

Benefit Program	2009	2010	2011	2012	2013	% Chg. FY 2012 to 2013
Veterans Pension	\$11,340	\$10,080	\$10,401	\$11,038	\$11,315	2.5%
Survivors Pension	\$7,941	\$5,478	\$5,905	\$6,521	\$6,988	7.2%
<b>Total</b>	<b>\$7,939</b>	<b>\$8,295</b>	<b>\$8,640</b>	<b>\$9,243</b>	<b>\$9,559</b>	<b>3.4%</b>

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

<sup>3</sup> On the rolls survivors of pre-World War I Veterans who served in the Spanish American War (102), The Mexican Border War (15) and the Civil War (1).





## 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	41,076	\$ 12,821	\$ 526,646,845
<b>Total</b>	<b>41,076</b>	<b>\$ 12,821</b>	<b>\$ 526,646,845</b>

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

Special monthly pension (SMP) status	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
With aid and attendance (A&A)	17,107	41.6%	\$ 15,595	\$ 266,779,274
With housebound (HB)	450	1.1%	\$ 9,089	\$ 4,090,177
Total with A&A or HB <sup>5</sup>	17,557	42.7%	\$ 15,428	\$ 270,869,450
Total without A&A or HB	23,519	57.3%	\$ 10,875	\$ 255,777,395
<b>Total all</b>	<b>41,076</b>	<b>100%</b>	<b>\$ 12,821</b>	<b>\$ 526,646,845</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	37,486	91.3%	\$ 12,764	\$478,463,515
Female Veterans	1,881	4.6%	\$ 13,546	\$25,479,226
<b>Total<sup>6</sup></b>	<b>41,076</b>	<b>100%</b>	<b>\$ 12,821</b>	<b>\$526,646,845</b>

<sup>4</sup> The two older pension programs 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.

<sup>6</sup> Total includes 1,709 Veterans and \$ 22,704,104 in benefits with no gender indicated in award record.



### 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>7</sup>	2,478	\$1,665	\$ 4,125,803
Improved Pension	305,638	\$11,393	\$3,482,125,518
<b>Total</b>	<b>308,116</b>	<b>\$11,315</b>	<b>\$3,486,251,321</b>

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

Special monthly pension (SMP) status	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
With aid and attendance (A&A)	115,031	37.3%	\$ 15,397	\$ 1,771,167,300
With housebound (HB)	7,835	2.5%	\$ 9,521	\$ 74,595,929
Total with A&A or HB	122,866	39.9%	\$ 15,023	\$ 1,845,763,229
Total without A&A or HB	185,250	60.1%	\$ 8,856	\$ 1,640,488,092
<b>Total all</b>	<b>308,116</b>	<b>100%</b>	<b>\$ 11,315</b>	<b>\$ 3,486,251,321</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	286,382	92.9%	\$ 11,245	\$3,220,429,295
Female Veterans	12,725	4.1%	\$ 12,205	\$155,308,299
<b>Total<sup>8</sup></b>	<b>308,116</b>	<b>100%</b>	<b>\$ 11,315</b>	<b>\$3,486,251,321</b>

<sup>7</sup> The "Other Pension" category groups the two older pension programs, Protected Pension or Old Law and Section 306 Pension, into one category.

<sup>8</sup> Total includes 9,009 Veterans and \$110,513,728 in benefits with no gender indicated in award record.





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

	Special monthly pension (SMP) 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)	15,343	40.9%	\$ 15,565	\$238,808,162
	With housebound (HB)	419	1.1%	\$ 8,978	\$3,761,701
	<b>Total with A&amp;A or HB</b>	<b>15,762</b>	<b>42.0%</b>	<b>\$ 15,390</b>	<b>\$242,569,863</b>
	<b>Total without A&amp;A or HB</b>	<b>21,724</b>	<b>58.0%</b>	<b>\$ 10,859</b>	<b>\$235,893,652</b>
<b>Total all male Veterans</b>		<b>37,486</b>	<b>100%</b>	<b>\$ 12,764</b>	<b>\$478,463,515</b>

Female Veterans	With aid and attendance (A&A)	929	49.4%	\$ 15,730	\$14,613,590
	With housebound (HB)	19	1.0%	\$ 9,985	\$189,720
	<b>Total with A&amp;A or HB</b>	<b>948</b>	<b>50.4%</b>	<b>\$ 15,615</b>	<b>\$14,803,310</b>
	<b>Total without A&amp;A or HB</b>	<b>933</b>	<b>49.6%</b>	<b>\$ 11,443</b>	<b>\$10,675,916</b>
<b>Total all female Veterans</b>		<b>1,881</b>	<b>100%</b>	<b>\$ 13,546</b>	<b>\$25,479,226</b>

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

	Special monthly pension (SMP) 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)	104,085	36.3%	\$ 15,337	\$ 1,596,368,210
	With housebound (HB)	7,350	2.6%	\$ 9,517	\$ 69,947,572
	<b>Total with A&amp;A or HB</b>	<b>111,435</b>	<b>38.9%</b>	<b>\$ 14,953</b>	<b>\$ 1,666,315,782</b>
	<b>Total without A&amp;A or HB</b>	<b>174,947</b>	<b>61.1%</b>	<b>\$ 8,883</b>	<b>\$ 1,554,113,513</b>
<b>Total all male Veterans</b>		<b>286,382</b>	<b>100%</b>	<b>\$ 11,245</b>	<b>\$ 3,220,429,295</b>

Female Veterans	With aid and attendance (A&A)	6,036	47.4%	\$ 15,696	\$ 94,742,633
	With housebound (HB)	305	2.4%	\$ 9,784	\$ 2,984,210
	<b>Total with A&amp;A or HB</b>	<b>6,341</b>	<b>49.8%</b>	<b>\$ 15,412</b>	<b>\$ 97,726,844</b>
	<b>Total without A&amp;A or HB</b>	<b>6,384</b>	<b>50.2%</b>	<b>\$ 9,020</b>	<b>\$ 57,581,455</b>
<b>Total all female Veterans</b>		<b>12,725</b>	<b>100%</b>	<b>\$ 12,205</b>	<b>\$ 155,308,299</b>



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

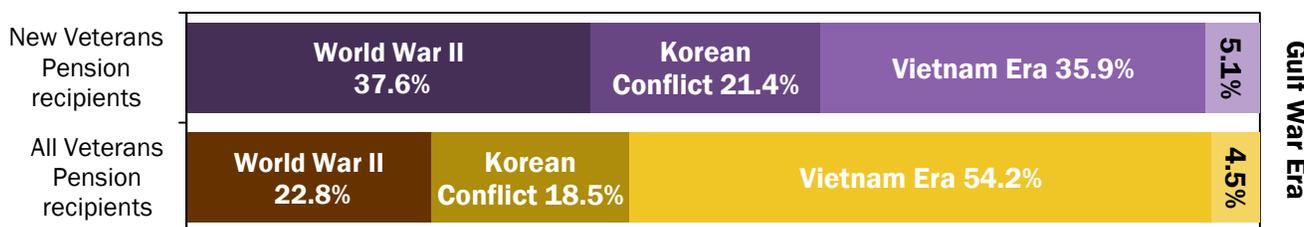
Period of service	Number of Veterans	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
World War II	15,460	37.6%	\$15,963	\$246,787,073
Korean Conflict	8,803	21.4%	\$13,191	\$116,120,639
Vietnam Era	14,735	35.9%	\$9,408	\$138,621,004
Gulf War Era	2,078	5.1%	\$12,088	\$25,118,129
<b>Total</b>	<b>41,076</b>	<b>100%</b>	<b>\$12,821</b>	<b>\$526,646,845</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	70,168	22.8%	\$13,912	\$976,196,045
Korean Conflict	57,004	18.5%	\$10,241	\$583,793,804
Vietnam Era	167,121	54.2%	\$10,497	\$1,754,319,139
Gulf War Era	13,823	4.5%	\$12,439	\$171,942,333
<b>Total</b>	<b>308,116</b>	<b>100%</b>	<b>\$11,315</b>	<b>\$3,486,251,321</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 Veterans Pension 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
Ages 34 and under	339	0.8%	\$12,140	\$4,115,472
Ages 35 through 54	1,567	3.8%	\$12,089	\$18,943,766
Ages 55 through 74	14,596	35.5%	\$9,340	\$136,326,140
Age 75 and over	24,574	59.8%	\$14,945	\$367,261,467
<b>Total</b>	<b>41,076</b>	<b>100%</b>	<b>\$12,821</b>	<b>\$526,646,845</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
Ages 34 and under	1,298	0.4%	\$12,595	\$16,348,734
Ages 35 through 54	11,286	3.7%	\$12,485	\$140,905,155
Ages 55 through 74	166,683	54.1%	\$10,499	\$1,750,041,534
Age 75 and over	128,746	41.8%	\$12,253	\$1,577,534,515
<b>Total<sup>9</sup></b>	<b>308,116</b>	<b>100%</b>	<b>\$11,315</b>	<b>\$3,486,251,321</b>

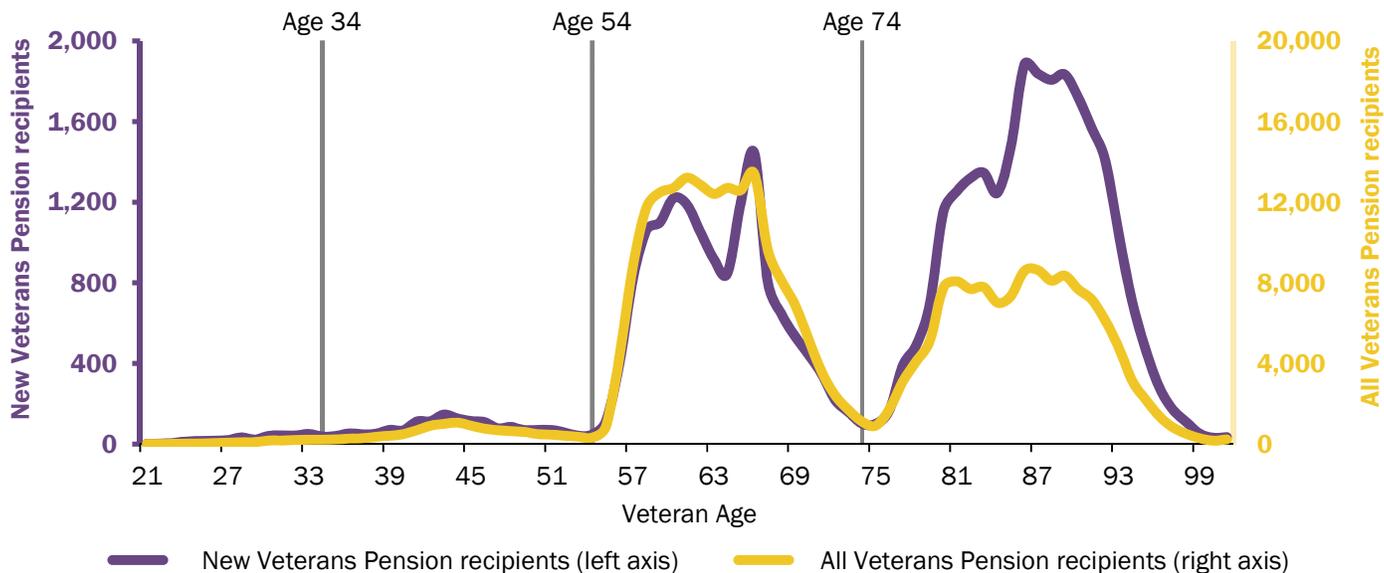


<sup>9</sup> Total includes 103 Veterans and \$1,421,383 in benefits with no date of birth indicated in award record



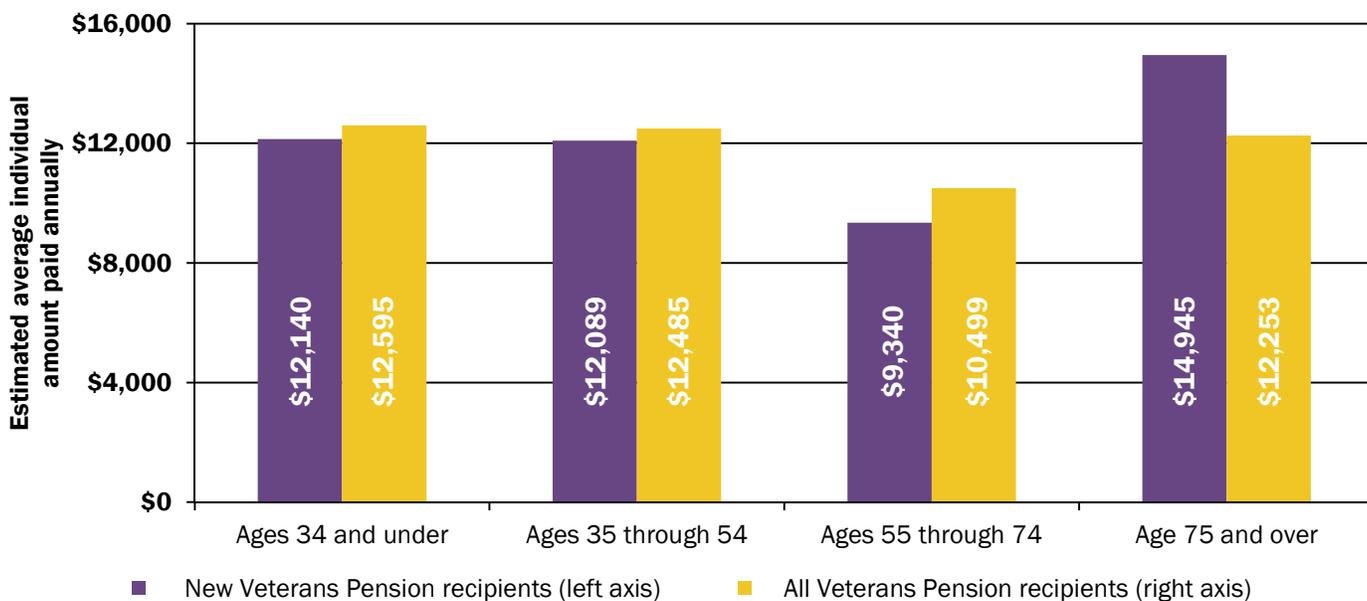
### Chart: New compared to all Veterans Pension recipients by age

The chart below displays the ages of the Veterans who began receiving benefits in FY 13 (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 13 (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>11</sup>	0	NA	NA
Improved Pension	37,400	\$9,430	\$352,688,834
<b>Total</b>	<b>37,400</b>	<b>\$9,430</b>	<b>\$352,688,834</b>

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

Special monthly pension (SMP) status	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
With aid and attendance (A&A)	25,797	69.0%	\$10,562	\$272,473,870
With housebound (HB)	91	0.2%	\$5,835	\$531,012
Total with A&A or HB <sup>12</sup>	25,888	69.2%	\$10,546	\$273,004,882
Total without A&A or HB	11,512	30.8%	\$6,922	\$79,683,951
<b>Total all</b>	<b>37,400</b>	<b>100%</b>	<b>\$9,430</b>	<b>\$352,688,834</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	97	0.3%	\$9,578	\$929,109
Female survivors	30,663	82.0%	\$9,390	\$287,933,535
Gender not indicated	6,640	17.8%	\$9,612	\$63,826,190
<b>Total</b>	<b>37,400</b>	<b>100%</b>	<b>\$9,430</b>	<b>\$352,688,834</b>

<sup>10</sup> The term “survivors” throughout this section includes surviving spouses and surviving children.

<sup>11</sup> The two older pension programs are no longer open to new applicants.

<sup>12</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>13</sup>	18,754	\$ 1,018	\$ 19,088,144
Improved Pension	191,696	\$ 7,572	\$ 1,451,590,191
<b>Total</b>	<b>210,450</b>	<b>\$ 6,988</b>	<b>\$ 1,470,678,335</b>

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

Special monthly pension (SMP) status	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
With aid and attendance (A&A)	109,805	52.2%	\$9,648	\$1,059,353,988
With housebound (HB)	1,679	0.8%	\$5,169	\$8,679,059
Total with A&A or HB	111,484	53.0%	\$9,580	\$1,068,033,047
Total without A&A or HB	98,966	47.0%	\$4,069	\$402,645,289
<b>Total all</b>	<b>210,450</b>	<b>100%</b>	<b>\$6,988</b>	<b>\$1,470,678,335</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	1,706	0.8%	\$1,784	\$3,044,049
Female survivors	144,269	68.6%	\$7,945	\$1,146,272,353
Gender not indicated	64,475	30.6%	NA	\$321,361,933
<b>Total</b>	<b>210,450</b>	<b>100%</b>	<b>\$6,988</b>	<b>\$1,470,678,335</b>

<sup>13</sup> The "Other Pension" category groups the two older pension programs, Protected Pension or Old Law and Section 306 Pension, into one category.





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

	Special monthly pension (SMP) 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)	29	96.7%	\$10,807	\$313,416
	With housebound (HB)	1	3.3%	\$221	\$221
	<b>Total with A&amp;A or HB</b>	<b>30</b>	<b>30.9%</b>	<b>\$10,455</b>	<b>\$313,637</b>
	Total without A&A or HB	67	69.1%	\$9,186	\$615,472
	<b>Total all male survivors</b>	<b>97</b>	<b>100%</b>	<b>\$9,578</b>	<b>\$929,109</b>

Female survivors	With aid and attendance (A&A)	22,083	99.7%	\$10,578	\$233,595,668
	With housebound (HB)	75	0.3%	\$5,660	\$424,484
	<b>Total with A&amp;A or HB</b>	<b>22,158</b>	<b>72.3%</b>	<b>\$10,561</b>	<b>\$234,020,153</b>
	Total without A&A or HB	8,505	27.7%	\$6,339	\$53,913,382
	<b>Total all female survivors</b>	<b>30,663</b>	<b>100%</b>	<b>\$9,390</b>	<b>\$287,933,535</b>

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

	Special monthly pension (SMP) 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)	139	8.1%	\$8,664	\$1,204,344
	With housebound (HB)	2	0.1%	\$5,216	\$10,433
	<b>Total with A&amp;A or HB</b>	<b>141</b>	<b>8.3%</b>	<b>\$8,615</b>	<b>\$1,214,777</b>
	Total without A&A or HB	1,565	91.7%	\$1,169	\$1,829,272
<b>Total all male survivors</b>		<b>1,706</b>	<b>100%</b>	<b>\$1,784</b>	<b>\$3,044,049</b>

Female survivors	With aid and attendance (A&A)	91,741	63.6%	\$9,766	\$895,942,029
	With housebound (HB)	1,296	0.9%	\$5,218	\$6,762,363
	<b>Total with A&amp;A or HB</b>	<b>93,037</b>	<b>64.5%</b>	<b>\$9,703</b>	<b>\$902,704,392</b>
	Total without A&A or HB	51,232	35.5%	\$4,754	\$243,567,961
	<b>Total all female survivors</b>	<b>144,269</b>	<b>100%</b>	<b>\$7,945</b>	<b>\$1,146,272,353</b>



## 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
Spanish American War	9	0.0%	\$7,336	\$66,024
World War I	49	0.1%	\$7,877	\$385,970
World War II	26,522	70.9%	\$9,911	\$262,868,782
Korean Conflict	6,869	18.4%	\$8,774	\$60,266,238
Vietnam Era	3,621	9.7%	\$7,426	\$26,889,052
Gulf War Era	330	0.9%	\$6,705	\$2,212,768
<b>Total</b>	<b>37,400</b>	<b>100%</b>	<b>\$9,430</b>	<b>\$352,688,834</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	118	0.1%	\$3,456	\$407,789
World War I	3,676	1.7%	\$3,116	\$11,455,719
World War II	144,103	68.5%	\$7,144	\$1,029,403,267
Korean Conflict	36,686	17.4%	\$6,582	\$241,464,943
Vietnam Era	24,590	11.7%	\$7,267	\$178,697,411
Gulf War Era	1,277	0.6%	\$7,243	\$9,249,207
<b>Total</b>	<b>210,450</b>	<b>100%</b>	<b>\$6,988</b>	<b>\$1,470,678,335</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 Veterans Pension 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
Ages 17 and under	38	0.1%	\$5,465	\$207,672
Ages 18 through 34	116	0.3%	\$3,862	\$448,035
Ages 35 through 54	1,092	2.9%	\$6,999	\$7,643,245
Ages 55 through 74	3,496	9.3%	\$6,054	\$21,165,223
Ages 75 and over	32,658	87.3%	\$9,897	\$323,224,658
<b>Total</b>	<b>37,400</b>	<b>100%</b>	<b>\$9,430</b>	<b>\$352,688,833</b>

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

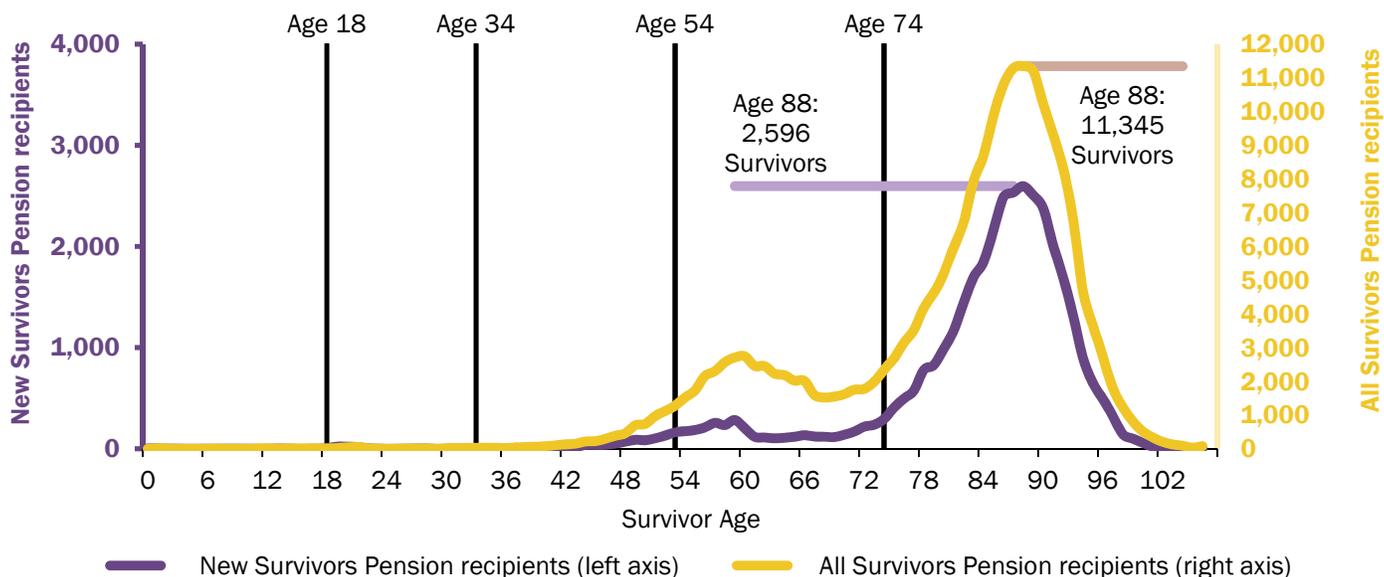
Age range	Number of survivors	% of total	Estimated average individual amount paid annually	Estimated total amount paid annually
Ages 17 and under	175	0.1%	\$4,482	\$784,383
Ages 18 through 34	360	0.2%	\$5,049	\$1,817,691
Ages 35 through 54	8,627	4.1%	\$5,960	\$51,416,102
Ages 55 through 74	41,717	19.8%	\$5,386	\$224,700,072
Ages 75 and over	158,153	75.1%	\$7,454	\$1,178,949,154
<b>Total<sup>15</sup></b>	<b>210,450</b>	<b>100%</b>	<b>\$6,988</b>	<b>\$1,470,678,335</b>

<sup>15</sup> Total includes 1,418 survivors and \$13,010,933 in benefits with no date of birth indicated in award record.



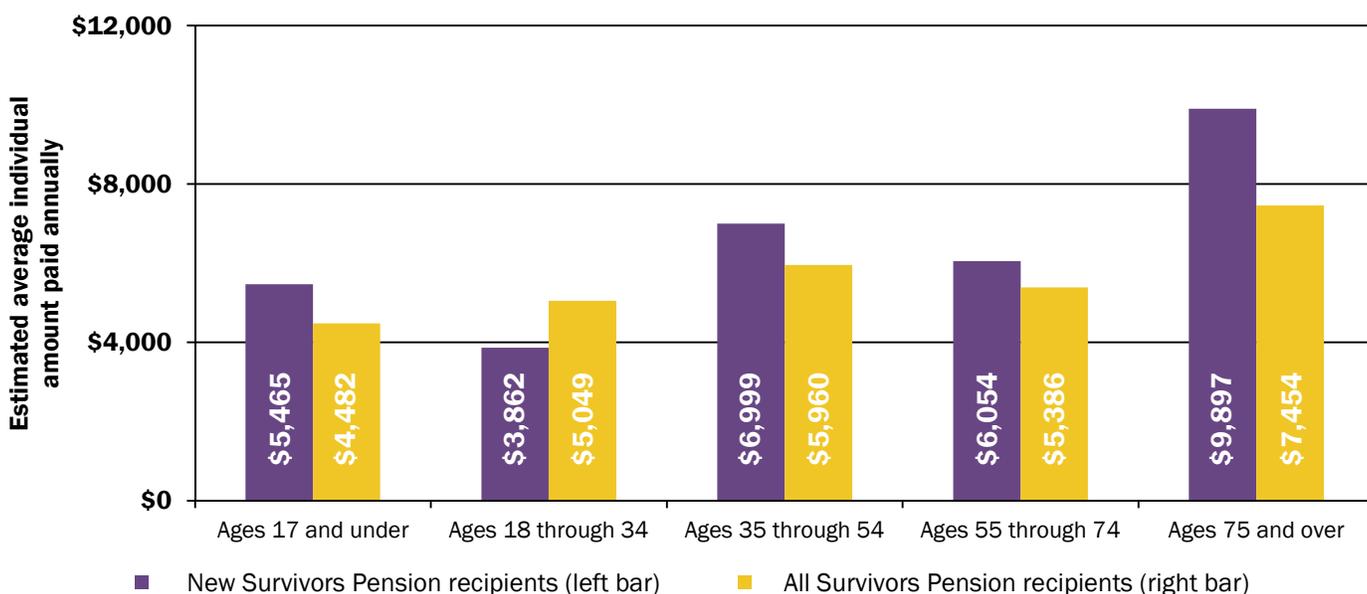
### Chart: New compared to all Survivors Pension recipients by age

The chart below displays the ages of the survivors who began receiving benefits in FY 13 (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 Survivors 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 13 (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.





# 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 due to injury, disease, or the infirmities of age. 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.

### Number of accounts of beneficiaries managed by beneficiary type<sup>16</sup>

Beneficiary Type	Number of Beneficiaries
Veteran	84,627
Surviving spouse	45,725
Adult disabled child	14,132
Minor child <sup>17</sup>	2,693
Dependent parent	85
<b>Total</b>	<b>147,262</b>

### Amount of benefits managed by beneficiary type<sup>18</sup>

Benefit Paid	Estimated total amount paid annually	Estimated average individual amount paid annually
Compensation	\$1,500,660,426	\$34,198
Veterans Pension	\$597,894,460	\$15,551
Survivors Pension	\$397,413,870	\$8,734
Dependency and Indemnity Compensation	\$138,447,031	\$13,552
<b>Total</b>	<b>\$2,634,415,787</b>	

<sup>16</sup> Source: Fiduciary Beneficiary System

<sup>17</sup> Includes minors in receipt of one-time insurance awards due to being named a beneficiary on an insurance policy

<sup>18</sup> Source: VETSNET Corporate Database



### Number of beneficiaries by fiduciary relationship<sup>16</sup>

Relationship	Number of Beneficiaries
Legal Custodian	114,455
Spouse Payee	18,764
Court Appointed Fiduciary	7,981
Supervised Direct Pay	4,201
Institutional Award	1,801
Custodian in Fact	46
Superintendent of Indian Reservation	9
Temporary Fiduciary	5
<b>Total</b>	<b>147,262</b>

During fiscal year 2013, fiduciary personnel conducted 325 misuse investigations of which 118 fiduciaries were removed based upon a finding of misuse of benefits. Of the cases VA referred to the VA Office of the Inspector General, 24 misuse cases were accepted by OIG for further investigation.

OIG reported the following actions have been taken<sup>19</sup>:

- Investigations Opened: 33
- Investigations Completed and Referred to Prosecutor's Office: 35
- Cases Accepted for Prosecution: 29
- Cases Declined for Prosecution: 1
- Cases Pending: 5

The number of OIG prosecutorial outcomes during fiscal year 2013<sup>19</sup>:

- Arrests: 14
- Indictments: 14
- Convictions: 17

The amount of funds involved in OIG prosecutorial outcomes during fiscal year 2013<sup>19</sup>:

- The total amount of restitution ordered in cases arising from the misuse of benefits by a fiduciary is \$3,567,160.
- The total amount of money recovered by the government in misuse cases is \$78,769.
- The total amount of benefits reissued to beneficiaries totaled \$508,704.

<sup>19</sup> Includes action taken by OIG on cases referred as of the end of fiscal year 2013. Figures may include cases referred during previous fiscal years.



## Appendix – Fiduciary Hub Addresses and Regional Offices Served

### Salt Lake City – UT VA Fiduciary Hub

PO Box 58086  
Salt Lake City, Utah 84158  
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

PO Box 5444  
Lincoln NE 68505-5444  
Regional offices served:

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

### Milwaukee – WI VA Fiduciary Hub

P.O. BOX 14975  
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

P.O. Box 3487  
Louisville KY 40201  
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 Street  
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

### Columbia – SC VA Fiduciary Hub

6437 Garners Ferry Road  
Columbia, SC 29209-2495  
Regional offices served:

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

**The Manila Regional Office oversees all fiduciary matters in the Philippines.**

Fiduciary Hub Contact Center:  
**1-888-407-0144.**



U.S. Department  
of Veterans Affairs  
Veterans Benefits  
Administration



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

### Philadelphia – PA Pension Management Center

PO Box 8079  
Philadelphia, PA 19101

Regional offices served:

Hartford	CT
Wilmington	DE
St. Petersburg	FL
Atlanta	GA
Boston	MA
Baltimore	MD
Togus	ME
Winston-Salem	NC
Manchester	NH
Newark	NJ
Buffalo	NY
New York	NY
Philadelphia	PA
Pittsburgh	PA
San Juan	PR
Providence	RI
Columbia	SC
Roanoke	VA
White River Junction	VT
Huntington	WV

### Milwaukee – WI Pension Management Center

P.O. BOX 14975  
Milwaukee, WI 53214

Regional offices served:

Montgomery	AL
Little Rock	AR
Chicago	IL
Indianapolis	IN
Louisville	KY
New Orleans	LA
Detroit	MI
St. Louis	MO
Jackson	MS
Cleveland	OH
Nashville	TN
Milwaukee	WI

### St. Paul – MN Pension Management Center

1 Federal Drive,  
Fort Snelling St. Paul, MN 55111

Regional offices served:

Anchorage	AK
Phoenix	AZ
Los Angeles	CA
Oakland	CA
San Diego	CA
Denver	CO
Honolulu	HI
Des Moines	IA
Boise	ID
Wichita	KS
St. Paul	MN
Ft. Harrison	MT
Fargo	ND
Lincoln	NE
Albuquerque	NM
Reno	NV
Muskogee	OK
Portland	OR
Sioux Falls	SD
Houston	TX
Waco	TX
Salt Lake City	UT
Seattle	WA
Cheyenne	WY

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

National Pension Call Center:  
**1-877-294-6380**



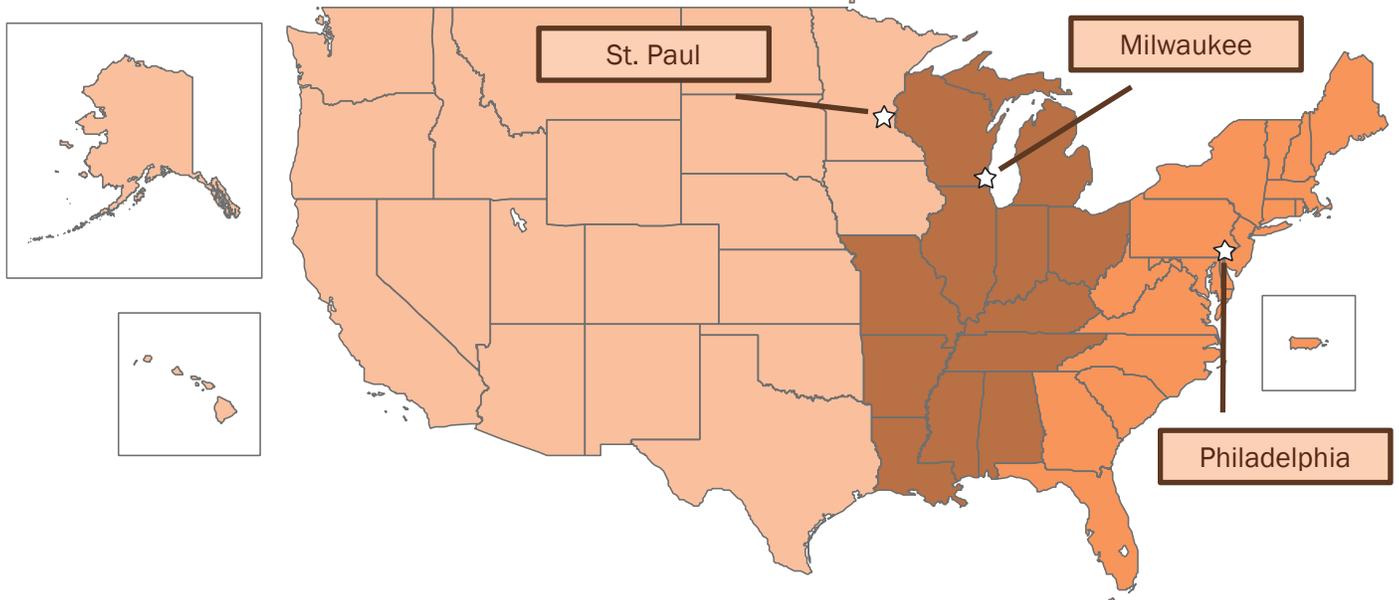
**VA**



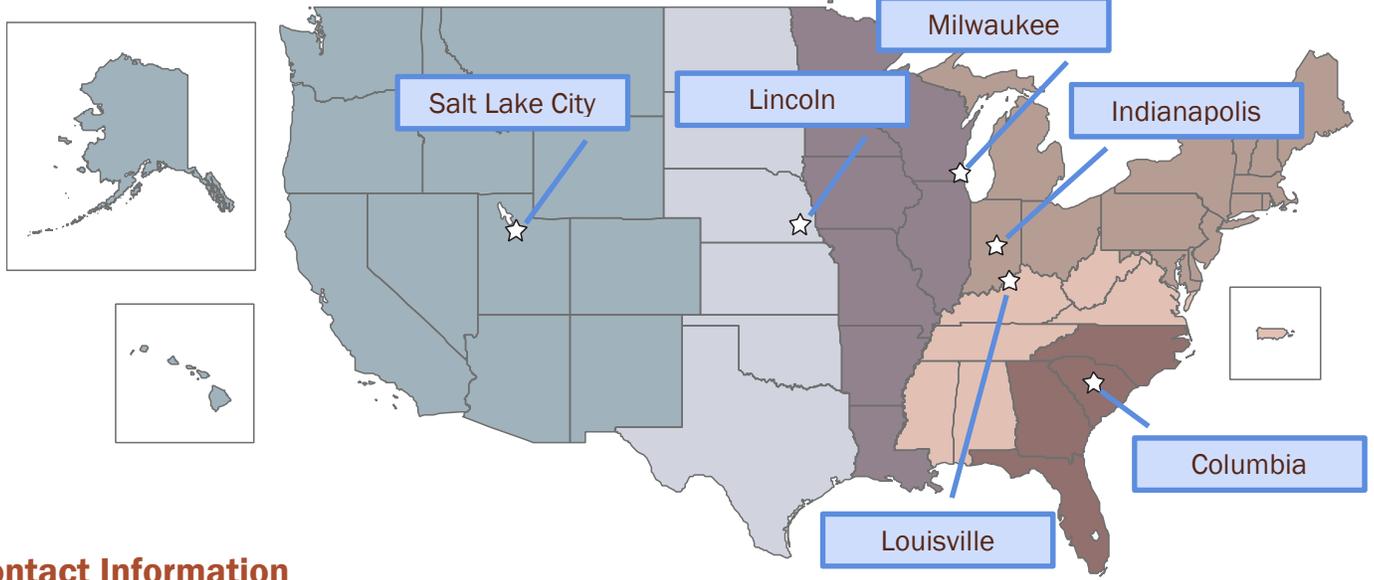
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Veterans Benefits  
Administration

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

## Pension Management Centers



## Fiduciary Hubs



### Contact Information

Pension Information:  
**1-877-294-6300**

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**

eBenefits  
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