



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
219,587 Veterans and
159,083 Survivors
Receive Pension
Benefits

A note on the data:

The 2020 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 2020 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 [138](#).



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A Note on How the FY 2020 Pension Data is Presented

New to the Rolls

Individuals who began receiving pension during fiscal year 2020 (October 1, 2019 to September 30, 2020) 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, 2020 are considered “on the rolls” and are outlined in tan/yellow. 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

| Version & changes | Date |
|-------------------|------------|
| Data as of | 09/30/2020 |



VA



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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,
 - 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.



VA



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Quick Reference: Recipients and Amounts by Program

Totals – new recipients

| | |
|---|---------------|
| Veterans who began receiving pension benefits | 19,421 |
| Survivors ¹ who began receiving pension benefits | 26,756 |
| Total | 46,177 |

Estimated annual amounts paid – new recipients

| Benefit program | Number of recipients | Estimated average individual amount paid annually | Estimated total amount paid annually |
|-------------------|----------------------|---|--------------------------------------|
| Veterans Pension | 19,421 | \$16,530 | \$321,037,558 |
| Survivors Pension | 26,756 | \$12,093 | \$323,558,937 |
| Total | 46,177 | \$13,960 | \$644,596,495 |

Totals – all recipients

| | |
|--------------------------------------|----------------|
| Veterans receiving pension benefits | 219,587 |
| Survivors receiving pension benefits | 159,083 |
| Total | 378,670 |

Estimated annual amounts paid – all recipients

| Benefit program | Number of recipients | Estimated average individual amount paid annually | Estimated total amount paid annually |
|-------------------|----------------------|---|--------------------------------------|
| Veterans Pension | 219,587 | \$12,717 | \$2,792,541,086 |
| Survivors Pension | 159,083 | \$9,333 | \$1,484,705,365 |
| Total | 378,670 | \$11,296 | \$4,277,246,451 |

¹ 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 ² | World War I | World War II | Korean Conflict | Vietnam Era | Gulf War Era |
|-------------------|------------------------------|-------------|---------------|-----------------|---------------|--------------|
| Veterans Pension | N/A | N/A | 4,220 | 7,268 | 7,131 | 802 |
| Survivors Pension | 3 | 8 | 13,738 | 9,246 | 3,325 | 436 |
| Total | 3 | 8 | 17,958 | 16,514 | 10,456 | 1,238 |

All improved pension recipients by period of service

| | Pre-World War I ³ | World War I | World War II | Korean Conflict | Vietnam Era | Gulf War Era |
|--------------|------------------------------|--------------|----------------|-----------------|----------------|---------------|
| Veterans | N/A | N/A | 19,765 | 38,317 | 143,900 | 17,605 |
| Survivors | 61 | 1,433 | 83,035 | 44,621 | 27,224 | 2,709 |
| Total | 61 | 1,433 | 102,800 | 82,938 | 171,124 | 20,314 |

Recipients and Amounts by Fiscal Year

All recipients FY 2016 to FY 2020

| Benefit program | 2016 | 2017 | 2018 | 2019 | 2020 | % Chg. FY 2019 to 2020 |
|-------------------|----------------|----------------|----------------|----------------|----------------|------------------------------|
| Veterans Pension | 288,710 | 276,570 | 260,089 | 239,114 | 219,587 | -8.2% |
| Survivors Pension | 202,975 | 201,433 | 192,823 | 170,037 | 159,083 | -6.4% |
| Total | 491,685 | 478,003 | 452,912 | 409,151 | 378,670 | -7.4% |

All recipients estimated average individual amount paid annually FY 2016 to FY 2020

| Benefit Program | 2016 | 2017 | 2018 | 2019 | 2020 | % Chg. FY 2019 to 2020 |
|-------------------|-----------------|-----------------|-----------------|-----------------|-----------------|------------------------------|
| Veterans Pension | \$11,991 | \$12,103 | \$12,350 | \$12,538 | \$12,717 | 1.4% |
| Survivors Pension | \$8,138 | \$8,443 | \$8,800 | \$8,976 | \$9,333 | 4.0% |
| Total | \$10,400 | \$10,561 | \$10,839 | \$11,058 | \$11,296 | 2.2% |

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

³ On the rolls survivors of pre-World War I Veterans who served in the Spanish American War (57), the Mexican Border War (4), and Peacetime (0).





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 ⁴ | NA | NA | NA |
| Improved Pension | 19,421 | \$16,530 | \$321,037,558 |
| Total | 19,421 | \$16,530 | \$321,037,558 |

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) | 12,823 | 66.0% | \$18,872 | \$241,999,849 |
| With housebound (HB) | 84 | 0.4% | \$10,036 | \$842,992 |
| Total with A&A or HB ⁵ | 12,907 | 66.5% | \$18,815 | \$242,842,841 |
| Total without A&A or HB | 6,514 | 33.5% | \$12,004 | \$78,194,717 |
| Total all | 19,421 | 100.0% | \$16,530 | \$321,037,558 |

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 | 18,365 | 94.6% | \$16,565 | \$304,223,697 |
| Female Veterans | 803 | 4.1% | \$16,001 | \$12,848,687 |
| Gender not indicated | 253 | 1.3% | \$15,673 | \$3,965,174 |
| Total | 19,421 | 100.0% | \$16,530 | \$321,037,558 |

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

⁵ 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 ⁶ | 565 | \$1,738 | \$982,238 |
| Improved Pension | 219,022 | \$12,746 | \$2,791,558,847 |
| Total | 219,587 | \$12,717 | \$2,792,541,086 |

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) | 87,697 | 39.9% | \$17,989 | \$1,577,584,149 |
| With housebound (HB) | 3,237 | 1.5% | \$10,758 | \$34,824,483 |
| Total with A&A or HB | 90,934 | 41.4% | \$17,732 | \$1,612,408,632 |
| Total without A&A or HB | 128,653 | 58.6% | \$9,173 | \$1,180,132,453 |
| Total all | 219,587 | 100.0% | \$12,717 | \$2,792,541,086 |

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 | 204,097 | 92.9% | \$12,694 | \$2,590,733,551 |
| Female Veterans | 9,786 | 4.5% | \$13,143 | \$128,621,919 |
| Gender not indicated | 5,704 | 2.6% | \$12,831 | \$73,185,616 |
| Total | 219,587 | 100.0% | \$12,717 | \$2,792,541,086 |

⁶ 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 gender⁷

| | 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) | 12,129 | 66.0% | \$18,888 | \$229,087,217 |
| | With housebound (HB) | 82 | 0.4% | \$10,045 | \$823,684 |
| | Total with A&A or HB | 12,211 | 66.5% | \$18,828 | \$229,910,901 |
| | Total without A&A or HB | 6,154 | 33.5% | \$12,076 | \$74,312,796 |
| Total | | 18,365 | 100.0% | \$16,565 | \$304,223,697 |

| | | | | | |
|-----------------|-------------------------------|------------|---------------|-----------------|---------------------|
| Female Veterans | With aid and attendance (A&A) | 526 | 65.5% | \$18,470 | \$9,714,996 |
| | With housebound (HB) | 2 | 0.2% | \$9,654 | \$19,308 |
| | Total with A&A or HB | 528 | 65.8% | \$18,436 | \$9,734,304 |
| | Total without A&A or HB | 275 | 34.2% | \$11,325 | \$3,114,383 |
| Total | | 803 | 100.0% | \$16,001 | \$12,848,687 |

All Veterans Pension recipients and estimated annual payments by type of special monthly pension and gender⁷

| | 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) | 80,788 | 39.6% | \$17,971 | \$1,451,847,351 |
| | With housebound (HB) | 3,023 | 1.5% | \$10,780 | \$32,587,477 |
| | Total with A&A or HB | 83,811 | 41.1% | \$17,712 | \$1,484,434,829 |
| | Total without A&A or HB | 120,286 | 58.9% | \$9,197 | \$1,106,298,723 |
| Total | | 204,097 | 100.0% | \$12,694 | \$2,590,733,551 |

| | | | | | |
|-----------------|-------------------------------|--------------|---------------|-----------------|----------------------|
| Female Veterans | With aid and attendance (A&A) | 4,156 | 42.5% | \$17,770 | \$73,853,418 |
| | With housebound (HB) | 157 | 1.6% | \$10,594 | \$1,663,229 |
| | Total with A&A or HB | 4,313 | 44.1% | \$17,509 | \$75,516,647 |
| | Total without A&A or HB | 5,473 | 55.9% | \$9,703 | \$53,105,272 |
| Total | | 9,786 | 100.0% | \$13,143 | \$128,621,919 |



⁷ 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

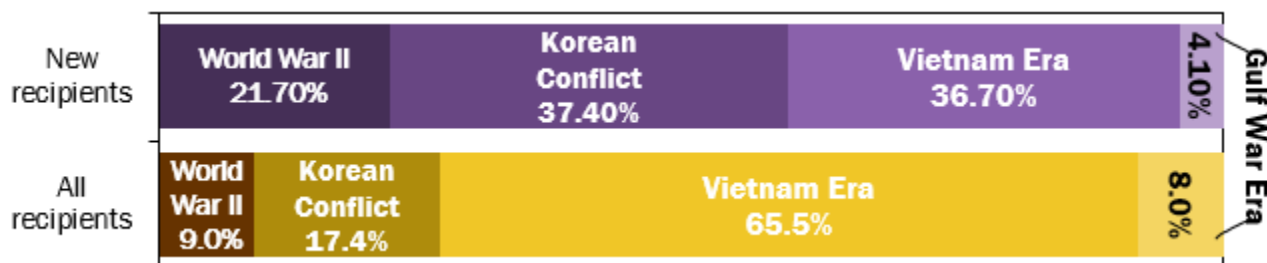
| Period of service | Number of Veterans | % of total | Estimated average individual amount paid annually | Estimated total amount paid annually |
|-------------------|--------------------|---------------|---|--------------------------------------|
| World War II | 4,220 | 21.7% | \$19,362 | \$81,707,293 |
| Korean Conflict | 7,268 | 37.4% | \$18,837 | \$136,904,406 |
| Vietnam Era | 7,131 | 36.7% | \$12,844 | \$91,592,269 |
| Gulf War Era | 802 | 4.1% | \$13,508 | \$10,833,591 |
| Total | 19,421 | 100.0% | \$16,530 | \$321,037,558 |

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 | 19,765 | 9.0% | \$17,797 | \$351,762,529 |
| Korean Conflict | 38,317 | 17.4% | \$15,471 | \$592,791,036 |
| Vietnam Era | 143,900 | 65.5% | \$11,142 | \$1,603,335,855 |
| Gulf War Era | 17,605 | 8.0% | \$13,897 | \$244,651,665 |
| Total | 219,587 | 100.0% | \$12,717 | \$2,792,541,086 |

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/yellow 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 | 48 | 0.2% | \$14,223 | \$682,704 |
| Age 35 through 64 | 889 | 4.6% | \$12,802 | \$11,380,924 |
| Age 65 through 74 | 4,328 | 22.3% | \$10,727 | \$46,426,123 |
| Age 75 and over | 14,156 | 72.9% | \$18,547 | \$262,547,807 |
| Total | 19,421 | 100% | \$16,530 | \$321,037,558 |

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 | 519 | 0.2% | \$14,874 | \$7,719,427 |
| Age 35 through 64 | 29,168 | 13.3% | \$13,335 | \$388,964,825 |
| Age 65 through 74 | 105,899 | 48.2% | \$10,918 | \$1,156,209,971 |
| Age 75 and over | 83,993 | 38.3% | \$14,758 | \$1,239,583,575 |
| Total⁸ | 219,587 | 100% | \$12,717 | \$2,792,541,086 |



⁸ Total includes 8 Veterans and \$63,288 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 20 (purple line, left axis) vs. the total number of Veterans receiving benefits at the end of the fiscal year (yellow line, right axis).

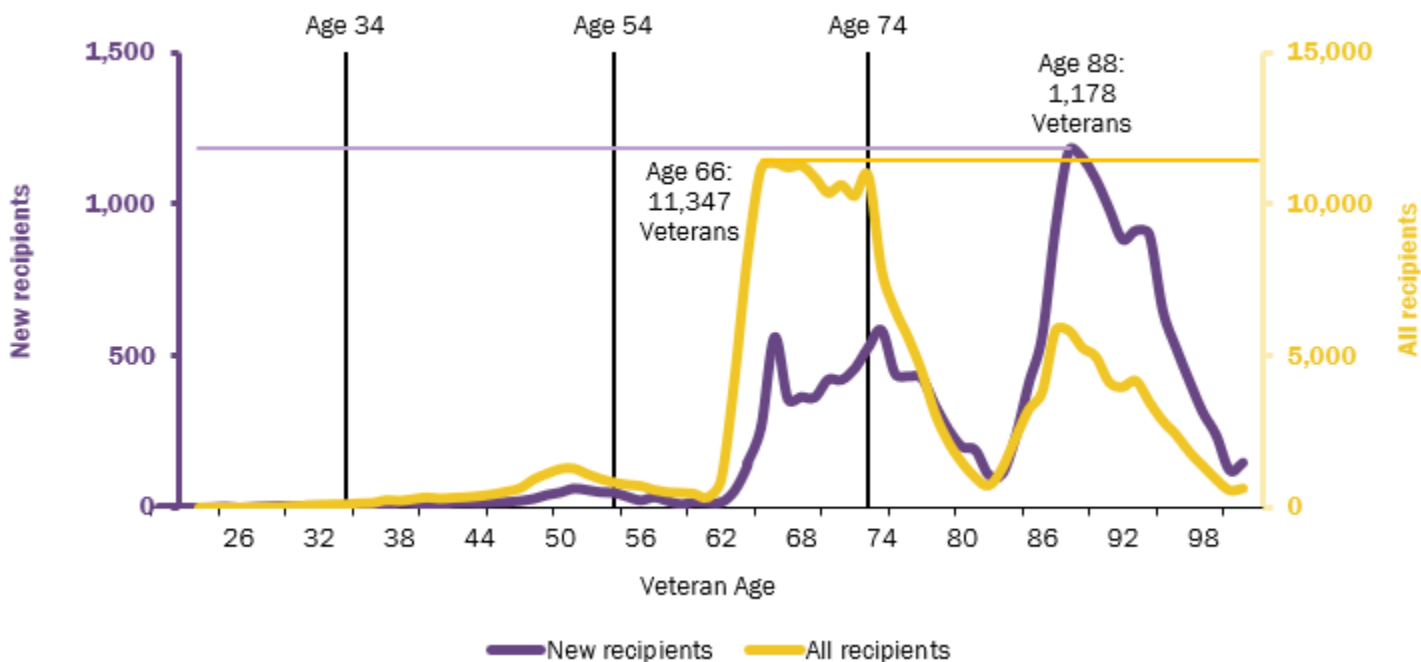
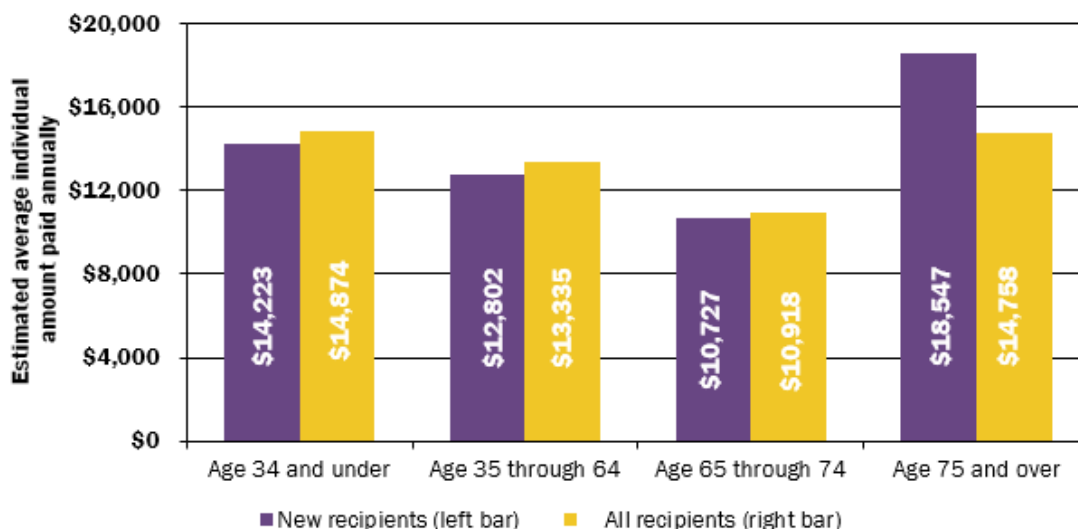


Chart: New compared to all Veterans Pension recipients by estimated average individual amounts paid annually and age

The chart below displays the estimated average individual amount paid annually to Veterans who began receiving benefits in FY 20 (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 (yellow bars on the right) by age group.





Survivors Pension Data⁹

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 ¹⁰ | N/A | N/A | N/A |
| Improved Pension | 26,756 | \$12,093 | \$323,558,937 |
| Total | 26,756 | \$12,093 | \$323,558,937 |

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) | 24,242 | 90.6% | \$12,758 | \$309,274,511 |
| With housebound (HB) | 47 | 0.2% | \$8,818 | \$414,468 |
| Total with A&A or HB ¹¹ | 24,289 | 90.8% | \$12,750 | \$309,688,979 |
| Total without A&A or HB | 2,467 | 9.2% | \$5,622 | \$13,869,958 |
| Total all | 26,756 | 100.0% | \$12,093 | \$323,558,937 |

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 | 206 | 0.8% | \$10,952 | \$2,256,120 |
| Female survivors | 24,185 | 90.4% | \$12,203 | \$295,131,398 |
| Gender not indicated | 2,365 | 8.8% | \$11,066 | \$26,171,419 |
| Total | 26,756 | 100.0% | \$12,093 | \$323,558,937 |

⁹ The term “survivors” throughout this section includes surviving spouses and children.

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

¹¹ 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 ¹² | 8,630 | \$914 | \$7,886,066 |
| Improved Pension | 150,453 | \$9,816 | \$1,476,819,299 |
| Total | 159,083 | \$9,333 | \$1,484,705,365 |

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) | 102,379 | 64.4% | \$11,700 | \$1,197,817,129 |
| With housebound (HB) | 797 | 0.5% | \$6,299 | \$5,020,169 |
| Total with A&A or HB | 103,176 | 64.9% | \$11,658 | \$1,202,837,298 |
| Total without A&A or HB | 55,907 | 35.1% | \$5,042 | \$281,868,067 |
| Total all | 159,083 | 100.0% | \$9,333 | \$1,484,705,365 |

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 | 1,515 | 1.0% | \$4,484 | \$6,792,860 |
| Female survivors | 120,832 | 76.0% | \$9,927 | \$1,199,536,789 |
| Gender not indicated | 36,736 | 23.1% | \$7,578 | \$278,375,716 |
| Total | 159,083 | 100.0% | \$9,333 | \$1,484,705,365 |

¹² 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 gender¹³

| | 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) | 158 | 76.7% | \$12,637 | \$1,996,620 |
| | With housebound (HB) | 1 | 0.5% | \$792 | \$792 |
| | Total with A&A or HB | 159 | 77.2% | \$12,562 | \$1,997,412 |
| | Total without A&A or HB | 47 | 22.8% | \$5,504 | \$258,708 |
| Total | | 206 | 100.0% | \$10,952 | \$2,256,120 |

| | | | | | |
|------------------|-------------------------------|---------------|---------------|-----------------|----------------------|
| Female survivors | With aid and attendance (A&A) | 22,164 | 91.6% | \$12,795 | \$283,589,159 |
| | With housebound (HB) | 39 | 0.2% | \$8,839 | \$344,736 |
| | Total with A&A or HB | 22,203 | 91.8% | \$12,788 | \$283,933,895 |
| | Total without A&A or HB | 1,982 | 8.2% | \$5,650 | \$11,197,502 |
| Total | | 24,185 | 100.0% | \$12,203 | \$295,131,398 |

All Survivors Pension recipients and estimated annual payments by type of special monthly pension and gender¹³

| | 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) | 353 | 23.3% | \$12,287 | \$4,337,460 |
| | With housebound (HB) | 4 | 0.3% | \$8,649 | \$34,596 |
| | Total with A&A or HB | 357 | 23.6% | \$12,247 | \$4,372,056 |
| | Total without A&A or HB | 1,158 | 76.4% | \$2,091 | \$2,420,804 |
| Total | | 1,515 | 100.0% | \$4,484 | \$6,792,860 |

| | | | | | |
|------------------|-------------------------------|----------------|---------------|----------------|------------------------|
| Female survivors | With aid and attendance (A&A) | 84,263 | 69.7% | \$11,782 | \$992,819,086 |
| | With housebound (HB) | 682 | 0.6% | \$6,139 | \$4,186,650 |
| | Total with A&A or HB | 84,945 | 70.3% | \$11,737 | \$997,005,736 |
| | Total without A&A or HB | 35,887 | 29.7% | \$5,644 | \$202,531,053 |
| Total | | 120,832 | 100.0% | \$9,927 | \$1,199,536,789 |



¹³ 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

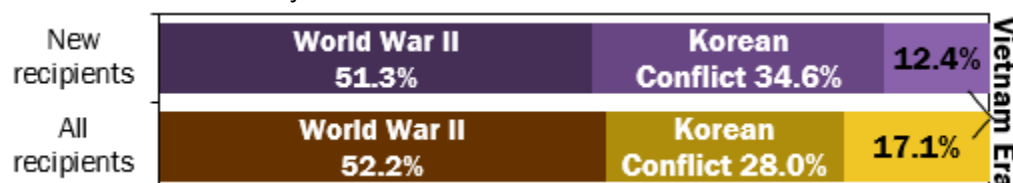
| Veteran's period of service | Number of survivors | % of total | Estimated average individual amount paid annually | Estimated total amount paid annually |
|-----------------------------|---------------------|---------------|---|--------------------------------------|
| Pre-World War I | 3 | <0.1% | \$8,832 | \$26,496 |
| World War I | 8 | <0.1% | \$11,589 | \$92,712 |
| World War II | 13,738 | 51.3% | \$12,607 | \$173,189,008 |
| Korean Conflict | 9,246 | 34.6% | \$12,148 | \$112,318,236 |
| Vietnam Era | 3,325 | 12.4% | \$10,357 | \$34,437,251 |
| Gulf War Era | 436 | 1.6% | \$8,017 | \$3,495,234 |
| Total | 26,756 | 100.0% | \$12,093 | \$323,558,937 |

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 | 61 | <0.1% | \$3,905 | \$238,213 |
| World War I | 1,433 | 0.9% | \$3,313 | \$4,747,211 |
| World War II | 83,035 | 52.2% | \$9,530 | \$791,307,282 |
| Korean Conflict | 44,621 | 28.0% | \$9,695 | \$432,605,100 |
| Vietnam Era | 27,224 | 17.1% | \$8,574 | \$233,426,607 |
| Gulf War Era | 2,709 | 1.7% | \$8,262 | \$22,380,951 |
| Total | 159,083 | 100.0% | \$9,333 | \$1,484,705,365 |

Chart: New compared to all Survivors Pension recipients by Veteran's period of service¹⁴

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/yellow bars on the bottom row indicate all survivors receiving pension benefits at the end of the fiscal year.



¹⁴ 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 | 24 | 0.1% | \$3,730 | \$89,520 |
| Age 18 through 34 | 54 | 0.2% | \$5,560 | \$300,223 |
| Age 35 through 64 | 1,227 | 4.6% | \$7,494 | \$9,194,759 |
| Age 65 through 74 | 1,225 | 4.6% | \$9,385 | \$11,496,766 |
| Age 75 and over | 24,210 | 90.5% | \$12,487 | \$302,306,154 |
| Total¹⁵ | 26,756 | 100% | \$12,093 | \$323,558,937 |

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 | 177 | 0.1% | \$5,831 | \$1,032,132 |
| Age 18 through 34 | 262 | 0.2% | \$6,795 | \$1,780,205 |
| Age 35 through 64 | 18,514 | 11.6% | \$7,160 | \$132,551,590 |
| Age 65 through 74 | 18,091 | 11.4% | \$6,357 | \$114,999,776 |
| Age 75 and over | 121,768 | 76.5% | \$10,117 | \$1,231,944,726 |
| Total¹⁶ | 159,083 | 100% | \$9,333 | \$1,484,705,365 |

¹⁵ Total includes 16 survivors and \$171,516 in benefits with no date of birth indicated in award record.

¹⁶ Total includes 271 survivors and \$2,396,936 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 20 (purple line, left axis) vs. the total number of survivors receiving benefits at the end of the fiscal year (yellow line, right axis).

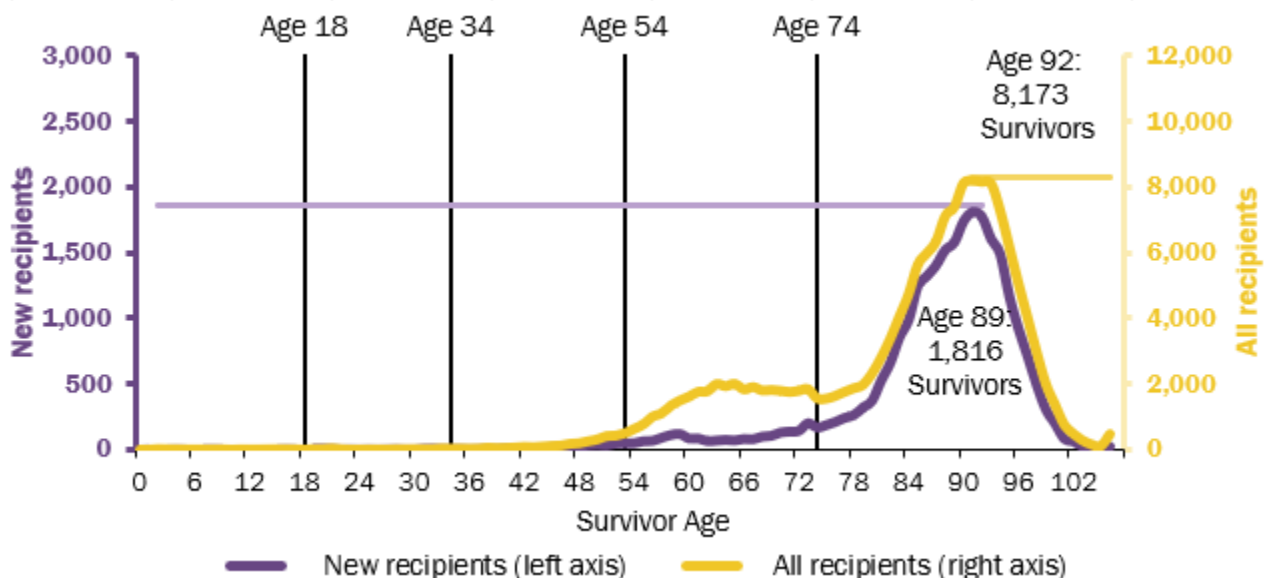
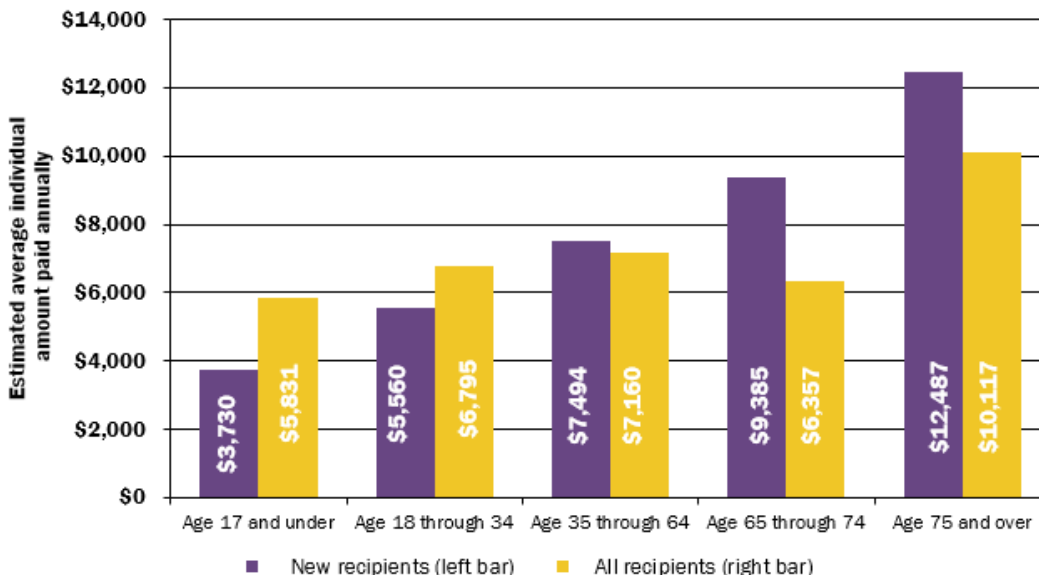


Chart: New compared to all Survivor Pension recipients by estimated average individual amounts paid annually and age

The chart below displays the estimated average individual amount paid annually to survivors who began receiving benefits in FY 20 (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 (yellow 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. 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 2020, Fiduciary Program totals represent the number of beneficiaries served during the fiscal year.

Number of beneficiaries by beneficiary type¹⁷

| Beneficiary Type | Number of Beneficiaries |
|---------------------------|-------------------------|
| Veteran | 96,004 |
| Surviving spouse | 53,857 |
| Adult disabled child | 9,386 |
| Minor child ¹⁸ | 2,640 |
| Dependent parent | 540 |
| Insurance | 352 |
| Total¹⁹ | 162,779 |

Amount of benefits managed by benefit type²⁰

| Benefit Paid | Estimated total amount paid annually | Estimated average individual amount paid annually |
|---------------------------------------|--------------------------------------|---|
| Compensation | \$2,244,599,818 | \$37,818 |
| Veterans Pension | \$565,712,167 | \$17,296 |
| Survivors Pension | \$488,730,293 | \$10,183 |
| Dependency and Indemnity Compensation | \$164,796,468 | \$16,564 |
| Total | \$3,463,838,746 | |

¹⁷ Source: Beneficiary Fiduciary Field System.

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

¹⁹ Includes any beneficiary who received services from VA's fiduciary program during FY 20.

²⁰ Source: VBA corporate database.



Number of beneficiaries by fiduciary relationship²¹

| Relationship | Number of Beneficiaries |
|----------------------------------|-------------------------|
| Legal Custodian | 121,252 |
| Spouse Payee | 25,556 |
| Court Appointed Fiduciary | 367 |
| Supervised Direct Pay | 109 |
| Institutional Award | 150 |
| Custodian in Fact | 40 |
| Proposed Fiduciary ²² | 15,312 |
| Total | 162,786 |

Misuse

During fiscal year 2020, fiduciary personnel conducted 1,551 misuse investigations of which 811 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), 20 misuse cases were accepted by OIG for further investigation.

OIG reported the following actions have been taken²³:

- Investigations opened: 20
- Investigations completed and referred to prosecutor's office: 20
- Cases accepted for prosecution: 8
- Cases declined for prosecution: 4
- Cases pending: 8

The number of OIG prosecutorial outcomes during fiscal year 2020²³.

- Arrests: 12
- Indictments: 18
- Convictions: 2

The amount of funds involved in OIG prosecutorial outcomes during fiscal year 2020²⁴:

- The total amount of restitution ordered in cases arising from the misuse of benefits by a fiduciary was \$69,678.
- The total amount of money recovered by the government in misuse cases was \$856,377.
- The total amount of benefits reissued to beneficiaries was \$3,825,224.

²¹ Source: Beneficiary Fiduciary Field System.

²² Includes beneficiaries awaiting the final determination of incompetency and/or the appointment of a fiduciary.

²³ Includes action taken by OIG on cases referred as of the end of fiscal year 2020. Figures may include cases referred during previous fiscal years.

²⁴ 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
of Veterans Affairs
Veterans Benefits
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



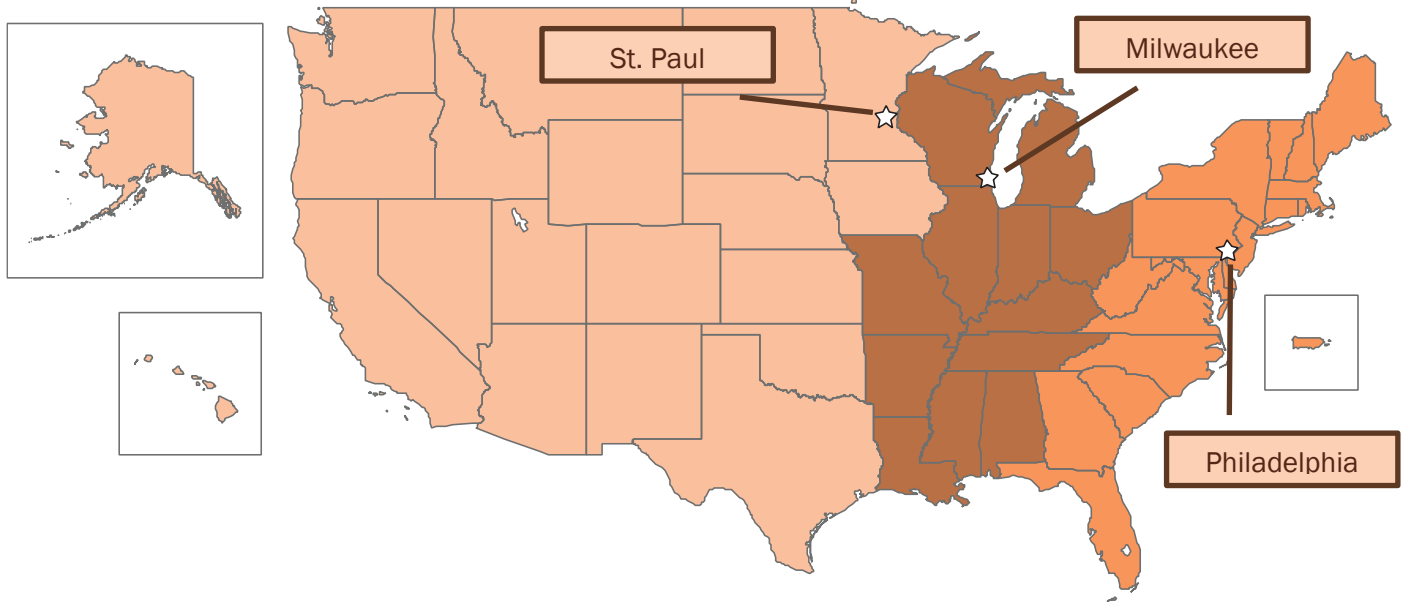
VA



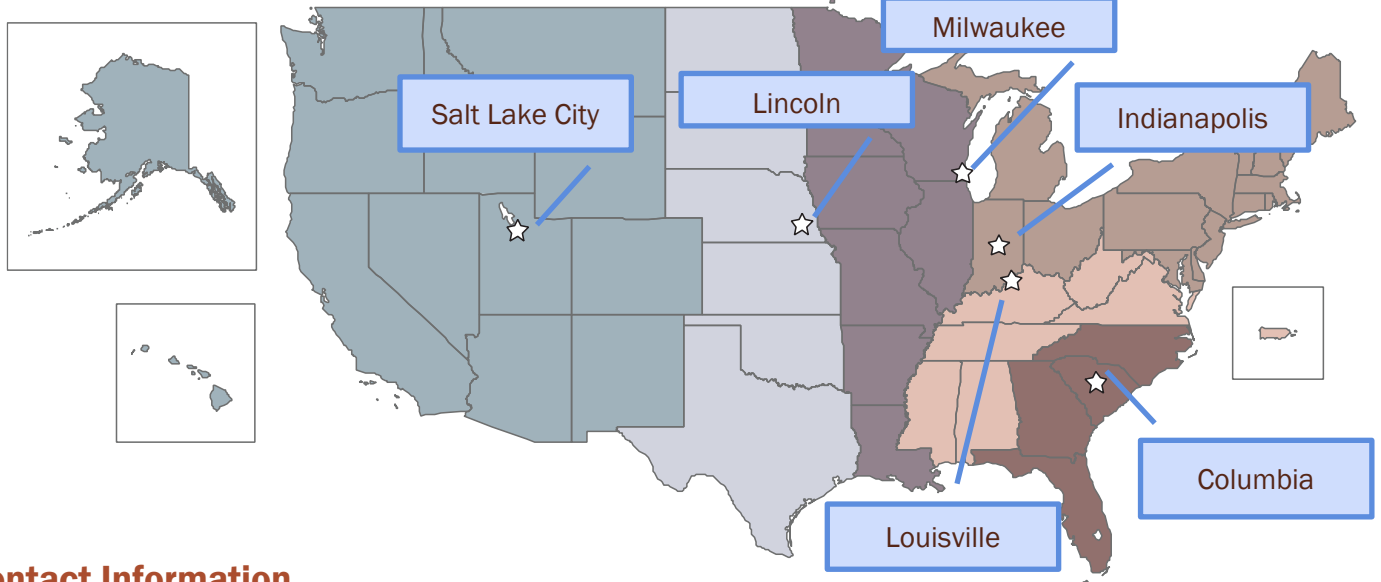
**U.S. Department
of Veterans Affairs**
Veterans Benefits
Administration

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

eBenefits
 (Online forms and applications)
www.ebenefits.va.gov

