



VA Benefit for Aid and Attendance Eligibility Self Pre-Qualification Form

This is a self pre-qualification form. You do not submit it anywhere but, rather, answer the questions and then refer to the highlighted text to see if your answers put you in the eligibility range. Please answer the questions below to determine if the veteran or single, surviving spouse is eligible for Aid and Attendance, Housebound Benefits or Basic Pension.

1. The veteran (living or deceased) on whose service the claim is based was discharged from service under what conditions:

- Honorable
- General
- Dishonorable

Answer: The veteran MUST have been discharged under ‘Honorable’ or ‘General under honorable’ conditions in order to be eligible.

2. The veteran served at least one day during the following periods and had 90 days of continuous military service.

- World War II: December 7, 1941 through December 31, 1946
- Korean War: June 27, 1950 through January 31, 1955
- Vietnam War: August 5, 1964 (February 28, 1961, for veterans who served “in country” before August 5, 1964), through May 7, 1975
- Gulf War: August 2, 1990, through a date to be set by law or presidential proclamation.

Answer: The veteran MUST have served a MINIMUM of 90 days in the military, at least ONE of which was during one of the combat eras named above.

3. List below the veteran’s or single, surviving spouse’s assets (do not include value of primary residence & vehicle)

Estimate total liquidatable assets \$ _____

Answer: Net worth is a bit of a hazy issue. The VA suggests that its adjudicators use a certain amount of personal judgment on this issue. But the bottom line is: Does it realistically appear that the veteran or surviving spouse may outlive their assets? If so, they are likely eligible.

- Do NOT count a residence or vehicle when estimating net worth.
- Do NOT count a life insurance policy (because the policy holder must be deceased in order to benefit from it).
- DO count CDs, annuities, stocks, bonds, savings, checking, IRAs, Keogh, etc.
- DO count any assets owned by the spouse as well.
- As a rule of thumb, assets should not exceed \$80,000. That amount drops, depending on the age of claimant.



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4. List below the estimated ANNUAL income of the veteran or single, surviving spouse:

Estimate total income (If married, include spousal income) \$ _____

Answer: All income must be included. This includes Social Security, pension, interest income, dividends, income from rental property, etc. If the veteran is married, then any spousal income must also be included.

5. List all unreimbursed, recurring health care expenses. This includes:

Assisted living costs (per month) \$ _____

Nursing home costs (per month) \$ _____

Home health care service (per month) \$ _____

Health insurance premium (per month) \$ _____

Medicare premium (per month) \$ _____

Regular (unreimbursed) prescriptions (per month & verifiable through a pharmacy printout) \$ _____

TOTAL Expenses per month \$ _____

(multiply x 12 to get total annual expenses) \$ _____

6. Subtract your total annual expenses from your total annual income and write the amount here: \$ _____

This is your "countable income."

Determining Eligibility from an income standpoint:

VETERAN: To be eligible for Basic Pension: A veteran alone must have countable income LESS than: \$10,929 per year. A veteran with a spouse must have countable income LESS than: \$14,313 per year.

VETERAN: To be eligible for Housebound Benefit: A veteran alone must have countable income of LESS than: \$13,356 per year. A veteran with a spouse must have countable income LESS than: \$16,740 per year.

VETERAN: To be eligible for the Aid & Attendance: A veteran alone must have countable income LESS than: \$18,234 per year. A veteran with a spouse must have countable income LESS than: \$21,615 per year.

SURVIVING SPOUSE: To be eligible for Basic Pension: A surviving spouse must have countable income LESS than: \$7,329 per year. A surviving spouse with a dependent must have countable income LESS than: \$9,594 per year.

SURVIVING SPOUSE: To be eligible for Housebound Benefit: A spouse alone must have countable income LESS than: \$8,957 per year. A spouse with a dependent must have countable income LESS than: \$11,219 per year.

SURVIVING SPOUSE: To be eligible for the Aid & Attendance: A spouse alone must have countable income LESS than: \$11,715 per year. A spouse with a dependent must have countable income LESS than: \$13,976 per year.