



## VA BENEFIT FOR AID & 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 in order to determine if the veteran or surviving spouse is eligible for Aid & 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 of 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 above named combat eras.**

3. List below the veteran's or 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 their 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.**

4. List below the estimated ANNUAL income of the veteran or 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 print-out): \_\_\_\_\_

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/yr.**

**A veteran with a spouse must have countable income LESS than: \$14,313/yr.**

**VETERAN: *To be eligible for Housebound Benefit:***

A veteran alone must have countable income of LESS than: \$13,356/yr.

A veteran with a spouse must have countable income LESS than: \$16,740/yr

**VETERAN: *To be eligible for the Aid & Attendance:***

A veteran alone must have countable income LESS than: \$18,234/yr.

A veteran with a spouse must have countable income LESS than: \$21,615/yr.

**SURVIVING SPOUSE: *To be eligible for Basic Pension:***

A surviving spouse must have countable income LESS than: \$7,329/yr.

A surviving spouse with a dependent must have countable income LESS than:  
\$9,594/yr.

**SURVIVING SPOUSE: *To be eligible for Housebound Benefit:***

A spouse alone must have countable income LESS than: \$8,957/yr.

A spouse with a dependent must have countable income LESS than: \$11,219/yr.

**SURVIVING SPOUSE: *To be eligible for the Aid & Attendance:***

A spouse alone must have countable income LESS than: \$11,715/yr.

A spouse with a dependent must have countable income LESS than: \$13,976/yr.

