

# VA Pension Worksheet

Veterans Name: \_\_\_\_\_

Address: \_\_\_\_\_

SSN: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

VA INCOME LIMITS (MAPR)	
Single Veteran	\$16,037.00
Single Veteran Housebound	\$19,598.00
Single Veteran A&A	\$26,752.00
Veteran w/1 dependent	\$21,001.00
Veteran w/1 dependent housebound	\$24,562.00
Veteran w/1 dependent A&A	\$31,714.00

**Asset Limitation = 150,538.00**

5 % RULE FOR 2021	
Single Veteran	\$801.00
Veteran w/1 dependent	\$1,050.00

WAR TIME PERIOD	
WWII	December 7, 1941 to December 31, 1946
KOREA	June 27, 1950 to January 31, 1955
VIETNAM	February 28, 1961 to May 7, 1975
GULF/IRAQ/ AFGHANISTAN	August 1, 1990 to present

## Will I Qualify?

This example is for a veteran with 1 dependent that does not need aid and attendance and is not housebound:

Total household income = 29,000.00  
 Total household med. exp. = 15,000.00  
 5% rule = 1,050.00  
 Vet w/1 dependent (MAPR) = 21,001.00

$29,000.00 - 15,000.00 - 1,050 = 12,950.00$

$21,001.00 - 12,950.00 = 8,051.00$

$8,051.00/12(\text{months}) = \$670.92$  is approximate monthly amount veteran would receive in pension.

## **PLEASE COMPLETE THE BACK SIDE OF THIS PAGE IN FULL.**

You will need to supply the following:

- ⇒ DD-214
- ⇒ ALL INCOME STATEMENTS
- ⇒ Social Security Statement
- ⇒ All Marriage licenses. You will have to provide a complete marital history for you and your spouse. To include dates, places and names.
- ⇒ Divorce Decrees
- ⇒ Birth Certificate for dependent **CHILDREN ONLY**
- ⇒ Direct Deposit Information
- ⇒ Work History
- ⇒ Completed VA Form 21-2680(doctor to complete), Sitter's Fee form, and VA Form 21-0779 (all attached and if applicable)

*Before September 7, 1980, Veteran must have served at least 90 days of active duty, with at least 1 day during a war time period. After September 7, 1980, Veteran must have served at least 24 months or the full period for which called or ordered to active duty with at least 1 day during a war time period. Veterans discharge from service under other than dishonorable conditions. VA Pensions are eligible to Veterans with lower income who are to disabled to work.*

# EXACT FIGURES ONLY

HOUSEHOLD INCOME	MONTHLY
Veteran Employment	\$
Veteran Social Security	\$
Veteran Retirement	\$
Veteran Interest/Dividend (to include IRA Distributions)	\$
Veteran Other Source of Income	\$
Spouse Employment	\$
Spouse Social Security	\$
Spouse Retirement	\$
Spouse Interest/Dividend (to include IRA Distributions)	\$
Spouse Other Source of Income	\$
DEPENDENT CHILDREN	\$
<b>(A) TOTAL INCOME times 12 =</b>	<b>\$</b>

ASSETS	TOTAL
Veteran Checking Acct.	\$
Veteran Savings Acct.	\$
Veteran Stocks, Bonds, etc.	\$
Veteran IRA, Money Mgmt., etc.	\$
Spouse Checking Acct.	\$
Spouse Savings Acct.	\$
Spouse Stocks, Bonds, etc.	\$
Spouse IRA, Money Mgmt., etc.	\$
Other Assets	\$
<b>TOTAL ASSETS</b>	<b>\$</b>
Additional property other than primary residence	Lot size= \$
<b>If you have assets, complete --- 21P-0969</b>	

MEDICAL EXPENSES	MONTHLY
Veteran Medicare Premiums	\$
Veteran Private Medical Insurance	\$
Veteran Supplemental Ins. Rx	\$
Veteran Supplemental Ins.	\$
Veteran Assisted Living Facility	\$
Veteran Nursing Home Costs	\$
Veteran Sitter Fee (private in-home care)	\$
Spouse Medicare Premiums	\$
Spouse Supplemental Ins.	\$
Spouse Supplemental Ins. Rx	\$
Spouse Supplemental Ins. Other	\$
Spouse Assisted Living Facility	\$
Spouse Nursing Home Cost	\$
Spouse Sitter Fee (private in-home care)	\$
<b>TOTAL MEDICAL EXPENSES times 12 =</b>	<b>\$</b>
<b>MINUS 5% RULE (Table on Front Page)</b>	<b>\$</b>
<b>Equals (B) MEDICAL DIFFERENCE</b>	<b>\$</b>

Complete Steps below to find out approx. monthly benefit.

STEP 1	STEP 2	STEP 3
Subtract (A) Total Income \$ _____ from (B) Medical Difference \$ _____ to equal Net Income = \$ _____	Subtract Net Income (STEP 1) \$ _____ from MAPR (table on front page) \$ _____ to equal Yearly Pension Amount = \$ _____ . (If amount is negative - no benefit is allowed)	Divide Yearly Pension Amount (STEP 2) \$ _____ by 12 months to get approx. monthly benefit amount= \$ _____

I hereby certify to the best of my knowledge and ability that the above information is true. I understand that the Department of Veterans Affairs will complete an income match with the IRS and the Social Security Administration. I further understand that if this information is not true and the benefit is granted it will create a debt with the Department of Veterans Affairs.

\_\_\_\_\_  
Signature of Veteran

\_\_\_\_\_  
Date