Pension and fiduciary service

PMC VSR Advanced Core Course Phase 5: Stages of a Claim   
Part 5: Award Adjustments

Lesson 3: Determine Net Worth Adjustments

Appendix D

May 2022

Example Contemporaneous Notice—Net Worth

**Department of Veterans Affairs**

In Reply Refer to:

April 23, 2022

DONALD JOHNSON 310/PMC/PMC

651 Leaning Tower Circle CSS TRA-986500

Amelia, PA 15001 JOHNSON, DONALD

Dear Mr. Johnson:

We amended your pension award based on your claim we received on August 15, 2021.

This letter tells you about your award rate, payment change date, what we decided, how we made our decision, the evidence used to decide your claim, and how we calculated your benefits. It also tells you of your responsibilities, what to do if you disagree with our decision, and who to contact if you have questions or need assistance.

**Your Award Amount and Payment Change Date**

Your monthly award amount is shown below:

|  |  |  |
| --- | --- | --- |
| **Monthly Award Amount** | **Payment Change Date** | **Reason For Change** |
| $0.00 | Jan 1, 2022 | Pension Award Terminated |

We're paying you as a veteran with no dependents. *Let us know right away if there is any change in your marital status.*

**What You Owe**

We have created an overpayment in your account because the information we received showed that we paid you too much. You will receive a separate letter, which will explain how much we overpaid you and how you can repay this debt.

**What We Decided**

We terminated your pension benefits effective January 1, 2022.

**How Did We Make Our Decision?**

We reviewed the evidence and determined that your net worth is above the established limit.

We don't consider your home, including a reasonable lot area and personal effects in determining your net worth. We do consider the following:

* Amount of assets
* Income for VA purposes
* Unreimbursed medical expenses

Should your circumstances change, complete and return the enclosed VA Form 21P-0527EZ Application for Veterans Pension.

**Evidence Used to Decide Your Claim**

In making our decision, we used the following evidence:

* VA Form 21P-0516, Improved Pension Eligibility Verification Report (Veteran with No Children) received August 15, 2021.

**What You Should Do If You Disagree With Our Decision**

If you do not agree with our decision, you should write and tell us why. You have one year from the date of this letter to seek review of our decision. The enclosed VA Form 20-0998, Your Right To Seek Review Of Our Decision explains your rights.

**If You Have Questions or Need Assistance**

If you have any questions, you may contact us by telephone, e-mail, or letter.

|  |  |
| --- | --- |
| **If you** | **Here is what to do.** |
| Telephone | Call us at 1‑800-827-1000. If you use a Telecommunications Device for the Deaf (TDD), the Federal number is 711. |
| Use the Internet | Send electronic inquiries through the Internet at <https://ask.va.gov/>. |
| Write | Put your full name and VA file number on the letter. Please send all correspondence to:  Department of Veterans Affairs  Pension Intake Center  PO Box 5365  Janesville, WI 53547-5365 |

In all cases, be sure to refer to your VA file number TRA-986500.

If you are looking for general information about benefits and eligibility, you should visit our website at https://www.va.gov, or search the Frequently Asked Questions (FAQs) at https://iris.va.gov.

We have no record of you appointing a service organization or representative to assist you with your claim. You can contact us for a listing of the recognized veterans' service organizations and/or representatives. Veterans' service organizations, which are recognized or approved to provide services to the veteran community, can also help you with any questions.

Sincerely yours,

**RO Director**

**VA Regional Office**

To email us visit https://iris.va.gov

Enclosure(s): VA Form 20-0998

VA Form 21P-527 EZ