



**Court Appointments**  
Pension and Fiduciary Service  
July 2018

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**Objectives**

- Recall policy relating to VA fiduciary appointment when a court-appointed conservator or guardian exists
- Document court appointments properly

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**References**

- FPM 2.D.4, *Fiduciary Information for all Initial and Successor Initial Appointment Field Examinations*
- FPG, *Field Examination Interview*

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### Court Appointments

- Appoint least restrictive – regardless of court
- Considering existing court appointments
- Certified or original court documents

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### Court-appointed Fiduciary

- Prior court-appointed fiduciary types
  - Prior to September 10, 2015: Court-appointed
  - After September 10, 2015: Court-appointed (VA Recognized)
- Fiduciary regulations and fiduciary types effective August 13, 2018
- Document court information in FELux
- Certified or original file-stamped court documents

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### FELux Court Appointed

- Court Appointment information
  - Financial appointment
  - Person appointment



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### Questions?



- Court appointments
- Court-appointed Fiduciary
- FElux Court Appointed

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### TMS Survey and Assessment

- An assessment and satisfaction survey have been assigned to you in TMS.
- You must pass the assessment prior to completing the survey.
- Be sure to complete the survey in TMS to receive credit for this training.

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