Pension and fiduciary service

PMC VSR Intermediate Core Course  
Phase 5: Proficiency Development  
Part 6: Award Adjustments\_Extension

Introduction to Apportionments

Appendix B

July 2024

Practice Exercise 2: Apportionment Payable or Not Payable

**Directions**: Based on the material covered, provide a response to each item in the chart below, indicating if apportionment is payable or not payable. **Use a P to indicate payable or NP to indicated Not Payable.**

|  |  |
| --- | --- |
| **Scenario** | **Payable (P)/ Not Payable (NP)** |
| Michael is a competent Veteran who is physically living apart from his spouse due to marital discord. |  |
| Sally Veteran’s spouse has been found guilty of conjugal infidelity by a court having proper jurisdiction. |  |
| Ralph Veteran is estranged from his spouse Rochelle, and is contributing to her support. |  |
| Rachel submitted a claim for an apportionment, and upon review of the file, it is determined the total benefit payable to the Veteran is so small that it does not allow payment of a reasonable amount to an apportionee. |  |
| Johnnie is a competent Veteran and he and his spouse reside together but do not cohabit. |  |
| Lionel Veteran is entitled to pension; however, his wife Marie lives with another person, but does not openly hold herself out as the other person’s spouse. |  |
| Donnie, is aged 18 and incapable of self-support, and is in receipt of VA education benefits and requests an apportionment of survivors’ benefits. |  |