



**U.S. Department of Veterans Affairs**  
Veterans Benefits Administration

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## **Fiduciary Program**

### **What is the Department of Veteran Affairs Fiduciary program?**

The fiduciary program provides oversight of VA's most vulnerable beneficiaries. These are people who are unable to manage their VA benefits on their own. This might be because of injury, disease, advanced age or youth. VA appoints fiduciaries who manage VA benefits for these beneficiaries. VA also conducts oversight of VA-appointed fiduciaries to ensure VA beneficiaries' needs are met.

### **What Is a Fiduciary?**

A fiduciary is a person or entity appointed by VA to receive benefits on behalf of a beneficiary. The benefits must be used to support the beneficiary or their dependents.

### **When Is a Fiduciary Needed?**

Every beneficiary has the right to manage his or her VA benefits. However, if medical evidence indicates they cannot manage their benefits, VA can appoint a fiduciary to assist the beneficiary. A fiduciary may also be appointed if a court declares a beneficiary unable to manage financial affairs. The decision can be appealed to the Board of Veterans Appeals.

### **What Is the Fiduciary Appointment Process?**

Prior to appointment, VA will assess the well-being and needs of the beneficiary and dependents. This assessment is partly based on a face-to-face meeting at the beneficiary's home.

The fiduciary will also be assessed. This ensures the selected person is qualified and willing to serve. The assessment may include:

- A face-to-face meeting
- A credit history check

- A criminal background check
- Character witness interviews

The fiduciary may also be required to submit annual accountings or obtain a surety bond. VA instructs the fiduciary on the duties and requirements of the position. VA will also provide information about the beneficiary's needs, including monthly bills.

After the initial fiduciary appointment, VA conducts follow-up visits. These visits monitor the beneficiary's well-being and the fiduciary's performance. If there are unmet needs or issues, VA may appoint a new fiduciary.

### **Who May Serve as a Fiduciary?**

VA selects the most effective and least restrictive fiduciary arrangement. The most important consideration is whether or not the beneficiary can manage their benefits under supervised direct pay with limited VA supervision. Then, VA will consider the following people for a fiduciary:

- The beneficiary's choice
- The beneficiary's spouse
- Other family members
- Friends
- Qualified caregivers
- A chief officer of a public or private institution
- The bonded officer of an Indian reservation
- An individual or entity appointed by a court

If none of the above are available, VA will appoint a paid fiduciary.

### **How Do I Become a Fiduciary?**

If you are interested in serving as a fiduciary, submit a request with the beneficiary's name and VA file number, along with your name and contact information, to your nearest VA regional office. You can find your nearest office at

<https://www.va.gov/directory/guide/division.asp?dnum=3> or by calling 800-827-1000.

If you are interested in serving as a professional fiduciary, submit your resume with a cover letter to [VA\\_Fiduciary@va.gov](mailto:VA_Fiduciary@va.gov) Include your name, the name of your organization or business, and your mailing and email addresses.

You can find additional information at <https://www.benefits.va.gov/FIDUCIARY/>.