

Fiduciary for Veteran Benefits

The Veterans Affairs (VA) Fiduciary Program protects veterans and other beneficiaries. A beneficiary is someone who gets benefits. The program is for people who are not able to manage their benefits. The VA will decide if someone needs a fiduciary.

A fiduciary is someone that helps another person manage their benefits. Usually, a family member or friend will serve. The VA will make sure they can serve. If a family member or a friend is not able to, the VA will choose a fiduciary. The VA will choose either a person or an organization.

Info for Beneficiaries

If you cannot manage your VA benefits, the VA will choose a fiduciary to help you. First, the VA will try to choose someone that you pick. The VA will make sure they meet the rules and can serve. When looking for someone to serve, these people may be considered:

- A spouse or family member
- Someone the court chooses
- Another interested party, or
- A professional

You have the right to appeal the VA's choice to give you a fiduciary. You also have the right to appeal whom the VA chooses.

If you do not agree with the VA on either of these points, you may:

- Appeal to the Board of Veterans' Appeals (Board). Tell them you do not agree with the choice. Ask the Board to review it.
- Give the VA new info. New info may lead them to change their choice.

Info for Fiduciaries

Do you want to help a family member or friend manage their benefits? Send a request to the VA Regional Office nearest you. The request should have the beneficiary's name and their VA file number. It should also have your name and contact info. Fiduciaries must use the benefits funds for the daily needs of the beneficiary. They should never borrow, loan, or gift funds that belong to the beneficiary.

Resources

The U.S. Department of Veterans Affairs [website](https://www.benefits.va.gov/fiduciary/)
(<https://www.benefits.va.gov/fiduciary/>)

There are also pages for [beneficiaries](https://www.benefits.va.gov/fiduciary/beneficiary.asp)
(<https://www.benefits.va.gov/fiduciary/beneficiary.asp>) and [fiduciaries](https://www.benefits.va.gov/fiduciary/fiduciary.asp)
(<https://www.benefits.va.gov/fiduciary/fiduciary.asp>).

[Appointment website](https://app.waitwhile.com/book/vabenefits/service) (<https://app.waitwhile.com/book/vabenefits/service>)

Getting Started with a Fiduciary for Veteran Benefits

Step 1. Determine if you receive veteran benefits.

Step 2. Determine if you need help managing your personal money affairs.

Step 3. Contact the North Carolina Veterans Benefits Administration Regional Office in Winston-Salem, NC by calling 800-827-1000 or schedule an appointment online at the appointment website (see Resources, above).