



FUTURE CARE FUNDING

W MORGAN ADVISORY

VETERANS EXTENDED — CARE BENEFITS —



War-time veterans and their surviving spouses, could be eligible for a tax free benefit to help pay for the cost of home health care, assisted living community or nursing home .

QUALIFICATION REQUIREMENTS

Veteran must have served one day during wartime with 90 days active duty.
Have an honorable or general discharge.

TOTAL MONTHLY BENEFITS

Single Veteran.....	\$2,424 per month
Married Veteran.....	\$2,873 per month
Spouse of a Living Veteran.....	\$1,903 per month
Dual Veterans (Husband and Wife both Veterans).....	\$3,384 per month
Surviving Spouse of Veteran.....	\$1,558 per month
This benefit is " tax free " and does not affect Social Security benefits.	



PERIODS OF WAR

WORLD WAR II: December 7, 1941 through December 31, 1946, extended to July 25, 1947 where continuous with active duty on or before December 31, 1946.

KOREAN CONFLICT: June 27, 1950 through January 31, 1955.

VIETNAM WAR: August 5, 1964 through May 5, 1975 or November 1, 1955 for those who served in the Republic of Vietnam.

GULF CONFLICT: August 2, 1990 through a future date set by law or presidential proclamation.

MEDICAL QUALIFICATION

To qualify medically, qualified claimants must have the need of the assistance of another individual with at least 2 activities of daily living (ADLs). ADL's include bathing, dressing, eating, toileting, transferring and ambulating. In addition, the VA now recognizes medication management along with instrumental activities of daily living (IADLs)



BRIGHT-LINE NET WORTH LIMIT

The Veterans Administration uses a "Bright-line Net Worth Limit" that gives a claimant a fairly straightforward way to determine the total amount of assets a claimant can have and still qualify for the Veterans' Pension program. Currently the Veteran's Pension Bright-line limit (VPBL) for 2026 is \$163,699. This is the amount of total assets you can have in your name not including your home or any vehicles or personal effects.



ASSET TRANSFER PENALTY

Currently there's a 3-year look-back for transferring assets for less than Fair Market Value, or for gifting assets which will create a penalty period based on amount that was transferred. Please note that the word "penalty" does not mean illegal. There are a number of qualification strategies that will allow you to qualify for benefits now. Call us to discuss your case today.



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DO YOU RESIDE IN AN INDEPENDENT LIVING COMMUNITY? ASK HOW YOU TOO COULD QUALIFY.
NOT EMPLOYED BY OR AFFILIATED WITH THE VETERANS ADMINISTRATION OR ANY GOVERNMENT AGENCY