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Steps to Exit the VA Fiduciary Program

1. Get a Medical Opinion From a Treating Provider

One of the most powerful pieces of evidence is a written statement from a qualified healthcare provider who knows your condition and treatment history. This opinion should clearly state that you are mentally competent to handle your own finances. It's not enough for them to say you've improved. They must specifically address your ability to manage your VA benefits.



2. Request a Field Examination

You can request a field exam through the VA Fiduciary Hub that oversees your case. During this in-person meeting, the VA will assess your living conditions, daily functioning, and how well you understand your financial responsibilities. They may ask questions about your monthly expenses, bank account balances, and how you would handle unexpected costs.

3. Show a Stable Track Record

The VA will want to see that you've maintained stability over time. This includes consistent medical treatment, no recent hospitalizations for mental health crises, and a pattern of responsible behavior. If you've already been managing other income sources or paying your own bills without issue, make sure you document that.



4. Prepare for a Re-evaluation

Once you submit your evidence, the VA may order a new C&P exam to reassess your mental capacity. This exam will evaluate your cognitive function, reasoning skills, and financial understanding. Don't leave this exam to chance; prepare for it in advance. Compile documentation to support your case and practice answering questions the doctor might ask.

Presented by:

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