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United States Senate

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July 15, 2021

The Honorable Denis R. McDonough
Secretary of Veterans Affairs
U.S. Department of Veterans Affairs
810 Vermont Avenue NW
Washington, DC 20420

Dear Secretary McDonough,

Last year, the Senate Committee on Veterans' Affairs raised concerns about repeated reports of elderly veterans falling prey to "pension poachers," or fraudulent actors that promise to help them obtain pension benefits while extracting fees, selling questionable financial services, or gaining access to certain personal accounts outright. In response, we included, in section 6007 of PL 116-315, language that requires the Department of Veterans Affairs (VA) "to develop, in collaboration with Veterans Service Organizations, an outreach plan for educating vulnerable individuals about potential financial exploitation relating to the receipt of pension[s]" VA, however, has focused its efforts on passive internet-based messaging rather than on the proactive community and VSO-based outreach which is necessary to reach the target population of veterans. We urge VA to refocus on proactive, community-based outreach to elderly veterans.

In VA's recently submitted report to this Committee on the outreach plan, VA described several current messaging campaigns that are ongoing. For example, VA has "an internal and external blog[,] a Pension Poaching prevention landing page on VA's website," and "fact sheets to educate Veterans and their families." These, however, are passive measures that require veterans to seek out VA, rather than VA proactively connecting and communicating with this particular cohort of veterans. If VA continues to be reactive versus proactively educating veterans on the front-end, these nefarious "pension poachers" will continue to be successful. Websites—while necessary—are not sufficient. When nearly 75 percent of all VA pension recipients are 75 years of age or older, any outreach and communication strategy that predominately focuses on mobile, social media, or Internet outreach is insufficient. Restricting outreach to only Internet-based platforms does not only negatively impact elderly veterans but also impacts veterans in rural areas that struggle to have broadband access.

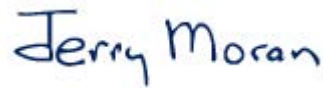
Furthermore, some of the most effective "pension poachers" in the industry rely on developing relationships first before defrauding their victims. Because VA lacks the resources to be everywhere, VA can, and must, rely on those that have deep roots in their communities. If, for example, VA wants to spread the word that veterans can apply for pension benefits for free, members of congressionally-chartered Veterans Service Organizations and state, county, tribal, and municipal Veteran Service Officers can do so, meeting potential pension recipients where they live, not just as professionals, but as friends, neighbors, or fellow parishioners.

VA pension benefits fulfill a monetary promise made to wartime veterans of a certain age threshold, certain disabilities, or low income and net worth. Unfortunately, there are some bad actors who take advantage of and exploit VA pension recipients and we must do our due diligence to protect veterans and their earned benefits. Updated fact sheets and social media messaging are not enough. Without proactive, community-based programming from VA, pension poachers will continue to defraud some of our nation's most vulnerable veterans. We look forward to continue working with you and other veteran stakeholders to protect our veterans and their earned pension benefits.

Sincerely,

A handwritten signature in blue ink that reads "Jon Tester". The signature is written in a cursive style with a long horizontal line extending to the right.

Jon Tester
Chairman
Committee on Veterans' Affairs

A handwritten signature in blue ink that reads "Jerry Moran". The signature is written in a cursive style.

Jerry Moran
Ranking Member
Committee on Veterans' Affairs