



## Post-9/11 GI Bill: Transferability

### What is transferability?

The Post-9/11 GI Bill allows service members (officer or enlisted, active duty or Selected Reserve), on or after August 1, 2009, to transfer unused education benefits to immediate family members (spouse and children). The service member must have at least six years of service, and commit to an additional four years of service in order to transfer benefits to a spouse or child. Because of the potential impact of this benefit on recruiting and retention, transferability policy is determined by the Department of Defense (DoD) and the military services.

The following DoD *Fact Sheet on Post-9/11 GI Bill Transferability*, dated April 28, 2009, can be found at <http://www.defenselink.mil/prhome/docs/Post-9-11%20GI%20Bill%20Transferability.pdf>. For the latest information on policy and rules for transferability of Post-9/11 GI Bill benefits, visit the DoD GI Bill website at [http://www.defenselink.mil/home/features/2009/0409\\_gibill/](http://www.defenselink.mil/home/features/2009/0409_gibill/).

### Department of Defense Fact Sheet on Post-9/11 GI Bill Transferability.

While the Post-9/11 GI Bill offers a very generous post-service education benefit, a special provision of the program allows career service members the opportunity to share their education benefits with immediate family members.

Allowing career service members to transfer their GI Bill benefits to family members has long been one of the most requested items among military family readiness and advocacy groups.

#### Eligible Individuals

Any member of the Armed Forces (active duty or Selected Reserve, officer or enlisted) on or after August 1, 2009, who is eligible for the Post-9/11 GI Bill, **and**

- Has at least 6 years of service in the Armed Forces on the date of election and agrees to serve 4 additional years in the Armed Forces from the date of election.
- Has at least 10 years of service in the Armed Forces (active duty and/or selected reserve) on the date of election, is precluded by either standard policy (service or DoD) or statute from committing to 4 additional years, and agrees to serve for the maximum amount of time allowed by such policy or statute, **or**
  - Is (or becomes) retirement eligible during the period from August 1, 2009, through August 1, 2013. A service member is considered to be retirement eligible if he or she has completed 20 years of active duty or 20 qualifying years of reserve service.
    - For those individuals eligible for retirement on August 1, 2009, no additional service is required.
    - For those individuals who have an approved retirement date after August 1, 2009, and before July 1, 2010, no additional service is required.
    - For those individuals eligible for retirement after August 1, 2009, and before August 1, 2010, 1 year of additional service after approval of transfer is required.
    - For those individuals eligible for retirement on or after August 1, 2010, and before August 1, 2011, 2 years of additional service after approval of transfer are required.
    - For those individuals eligible for retirement on or after August 1, 2011, and before August 1, 2012, 3 years of additional service after approval of transfer required.

#### Eligible Family Members

An individual approved to transfer an entitlement to educational assistance under this section may transfer the individual's entitlement to:

- The individual's spouse.



- One or more of the individual's children.
- Any combination of spouse and child.
  
- A family member must be enrolled in the Defense Eligibility Enrollment Reporting System (DEERS) and be eligible for benefits, at the time of transfer to receive transferred educational benefits.
- A child's subsequent marriage will not affect his or her eligibility to receive the educational benefit; however, after an individual has designated a child as a transferee under this section, the individual retains the right to revoke or modify the transfer at any time.
- A subsequent divorce will not affect the transferee's eligibility to receive educational benefits; however, after an individual has designated a spouse as a transferee under this section, the eligible individual retains the right to revoke or modify the transfer at any time.

### **Nature of Transfer**

An eligible Service member may transfer up to the total months of unused Post-9/11 GI Bill benefits, or the entire 36 months if the member has used none.

Family member use of transferred educational benefits is subject to the following:

- Spouse:
  - May start to use the benefit immediately.
  - May use the benefit while the member remains in the Armed Forces or after separation from active duty.
  - Is not eligible for the monthly stipend or books and supplies stipend while the member is serving on active duty.
  - Can use the benefit for up to 15 years after the service member's last separation from active duty.
- Child:
  - May start to use the benefit only after the individual making the transfer has completed at least 10 years of service in the Armed Forces.
  - May use the benefit while the eligible individual remains in the Armed Forces or after separation from active duty.
  - May not use the benefit until he/she has attained a secondary school diploma (or equivalency certificate), or reached 18 years of age.
  - Is entitled to the monthly stipend and books and supplies stipend even though the eligible individual is on active duty.
  - Is not subject to the 15-year delimiting date, but may not use the benefit after reaching 26 years of age.