RETIREMENT AND PIECE OF MIND

Patricia Sparks

Helpful Documents Available

- At Base Legal
  - Estate Planning
  - Probate and Settling in Washington
  - Powers of Attorney
  - Survivor Benefit Plan
  - VA Survivor Benefits
  - Will Preparation

- From the Wallin Funeral Home
  - Resource Guide
  - Personal Planning Guide

RETIRED ACTIVITIES OFFICE

CARE FOR YOUR SPOUSE WHILE YOU STILL CAN

STEP-BY-STEP PROCEDURES FOR RETIREES

MAKE A FILE WHICH INCLUDES THE FOLLOWING:

Full name, rate/rank, social security number
Military records – DD-214, final orders, pay statement, etc.
Life insurance policies (with up to date beneficiaries) – Government and commercial
Medical Insurance
Wills, community property agreements, living wills, powers of attorney, Etc.
List of bank accounts, stocks, bonds and other investments, etc.
Property deeds
VA disability letters – if disabled
Civil records – Birth certificates, social security numbers, marriage certificate and divorce papers
Attorney's name and address
Tax records – name and address of tax preparer and location of records

INSTRUCT BENEFICIARIES ON LOCTION AND IMORTANCE OF THIS FILE

STEP-BY-STEP FOR THE SURVIVING SPOUSE OR EXECUTOR

Immediately, or as soon as possible, call the nearest Retired Activities Office (RAO). Be prepared to give: date and time of death, cause, full name, rank/rate, SSN, date of retirement of retiree and name and address of next of kin. If there is a surviving spouse be prepared to give full name, SSN, date of birth, date of marriage and address. Also, name and address of funeral director.

Use your local RAO, or Office of Personnel Management if combined military/civil service retiree, to assist in completing applications for unpaid compensation, survivors benefit plan, insurance, etc.

Surviving beneficiaries should obtain new ID cards, if entitled, to ensure continued enrollment in DEERS.

The above is not intended to be all inclusive as each individual may have special circumstances.

The NAS Whidbey RAO is located in the Norwester building # 2556 on Ault Field, we are open 0900 to 1300 Monday and Wednesday number is 360 257-6432. Your RAO is here to help you. We are all volunteers and may not know all the answers, but we know how to find them to make sure you get the help you need.

They Need Volunteers

Fleet & Family Support Front Desk 360-257-6289

All on the handouts

WIDOWER'S CHECKLIST

The following is a basic list of important things that a widower should do when his spouse passes away:

1. Turn in souse's ID card at the DEERS office, 3515 N Princeton Bldg. 2641 This Will remove the spouse from the DEERS system.

2. Advise Defense Financial Accounting Servia (DFAS) of the new beneficiary of any unpaid compensation due in the event of your death.

3. If you are a participant in the SBP program, notify DFAS by letter so that the monthly pay deduction can be suspended. This requires a death certificate.

4. Update you will. Base legal Office or personal attorney can assist.

5. Close spouse's credit card accounts and destroy cards.

6. Probate will as required. A community property agreement could eliminate this requirement.

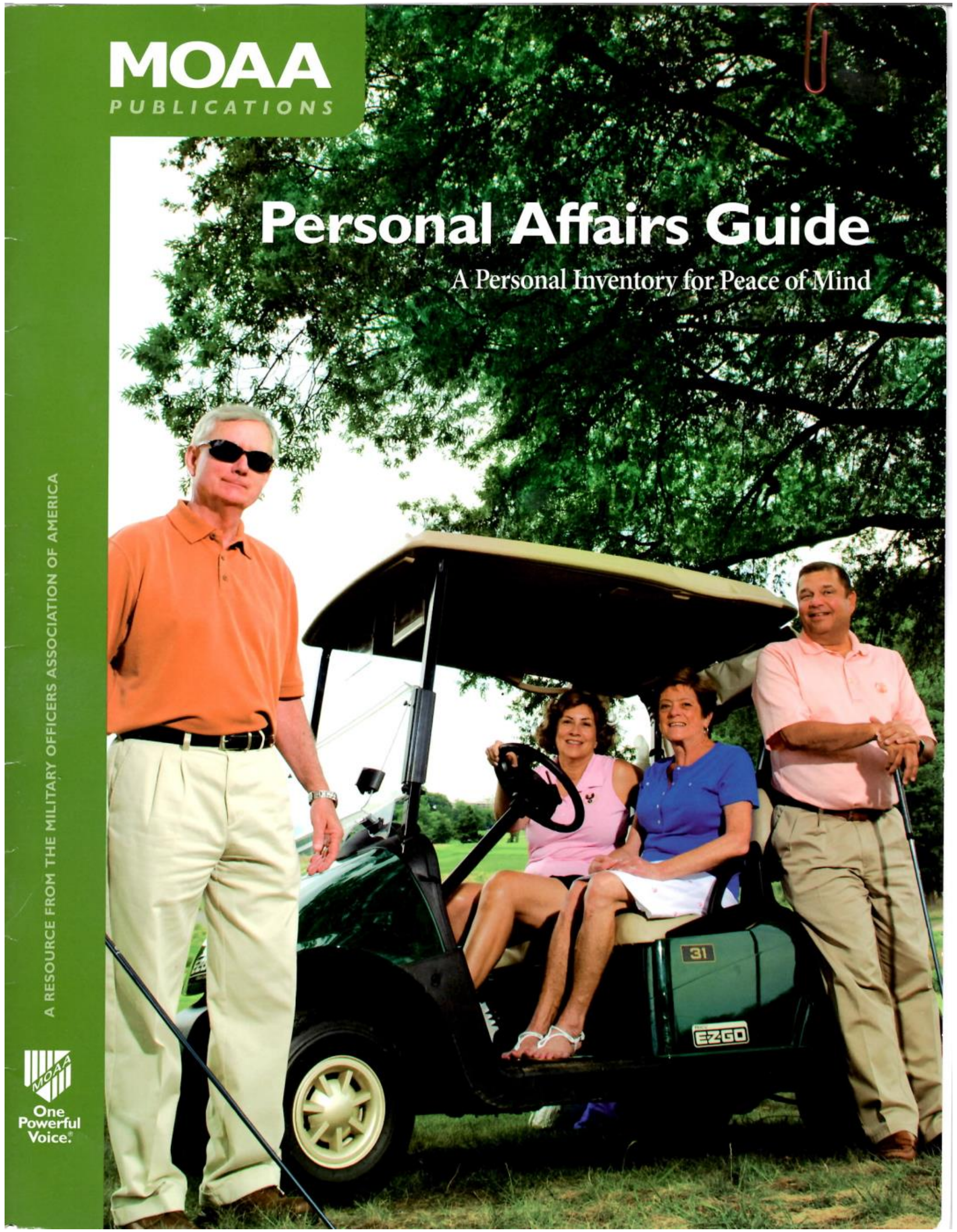
7. Change joint ownership of property, as required.

8. Dissolve joint bank account ownership. Death certificate required.

9. Arrange for payment of outstanding joint bills.

10. File insurance claims, if there are any.

11. File TRICARE/Medicare claims promptly, if required.



- Excellent book to keep track of important things
- If you would like one, Make sure you get on the signup sheet
- Should have them at the next Meeting

BOTH LARRY AND PAT'S SLIDES WILL BE POSTED ON OUR WEB SITE

HTTPS://WICMOAA.COM/EVENTS