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Please provide the following supporting documents to complete Burial Reimbursement, Dependency Indemnity Compensation (DIC), Survivor Benefits Plan (SBP), DEERS ID Card.

DD214
Death Certificate
Marriage Certificate
If there is a former spouse please provide last name, first name, date of marriage, city and state.
Copy of invoice from the funeral home.
Banking information routing number, account number and name of financial institution.
You're Social Security Card.
Military ID card and driver's license and/or Washington State ID.

Death Notification Checklist

When a family member or friend has died, it is important to notify various government agencies, bank, creditors, insurance companied, and credit reporting agencies of the death. To reduce the risk of identity theft, these notifications should be made promptly. To expedite the process, you should initially make phone contact followed by written communication.

For all the government agencies, financial institutions, and insurance companies you will need:

- _ The decedent's social security number
- _ A certified copy of the death certificate
- _ If you are a personal representative of the estate, you will need your appointment form from the probate court.

Ensure you retain copies of all written communications. The following is a checklist of possible agencies and businesses that should be notified in case of a death. Each situation is unique this list may not be complete.

List of Important Documents:

- _ Death certificate (usually 5 – 7copies)
- _ Marriage certificate
- _ Divorce decree
- _ Birth certificate
- _ Immigration documents
- _ Naturalization papers
- _ Adoption and/or custody documents
- _ Social Security card for all family members
- _ Wills, community property agreements, deeds of trust

Help finding lost wills at: http://www.wsba.org/Resources-and-Services/Find-legal-Help/Will-Search

- _ Life insurance policy(s)
- _ Title to vehicles and homes
- _ DD214 (Certificate of Release or Discharge from Active Duty)

If you need to order it visit: http://www.archives.gov/veterans/military-service-records/

Important Forms for Active Duty Deaths: (These are requested by the Casualty office)

- _ DD form 2064 – Certificate of Death(overseas) – can be ordered from the local casualty office
- _ DD form 1300 – Report of Casualty of Death
- _ AHRC from 2496-E – Statement of Services (authorized replacement for the DD from 214)

Ordering a Washington Death Certificate

Normally it takes 7 to 10 days to receive a death certificate after death either through the county courthouse or funeral home. You can order additional copies at the Center of Health Statistics:
https://www.doh.wa.gov/LicensesPermittedCertificate/BirthDeathMarriageandDivorce/OrderCertificates

Notify Government Agencies

- _ Social Security Administration,
  Active duty deaths, 1-866-777-7887 or Retired, 1-800-772-1213
  You will need the deceased's Social Security number and date of birth. The Social Security Office automatically notifies Medicare of the death.
- _ Veteran's Administration, 1-800-827-1000 (if the decedent was formerly in the military). You can check the status of your claim and obtain tax documentation by calling the same number.
- _ Defense Finance and Accounting Service, 1-800-321-1080 (Military retiree receiving benefits)
- _ Office of Personnel Management, 1-888-767-6738 (If decedent is retired or former federal civil service employee)
- _ Veterans' life insurance, Service Disable Veteran Insurance, 1-800-669-8477
- _ Veteran's Group Life Insurance, 1-800-419-1473
- _ Federal Employee Group Life Insurance, 1-800-633-4542
- _ U.S. Immigration Service, 1-800-375-5283 (If decedent was not a U.S. citizen)
- _ State Department of Motor Vehicles (If decedent had a driver's license or state ID)
- _ U.S. Postal System
- _ WA State Department of Revenue – needs to be notified of the death if the deceased had an active Sole Proprietor business, 1-360-705-6705 or email: http://www.dor.wa.gov
- _ WA State Department of Labor & Industries – Crime Victim's Compensation Program Contact this agency for help and possible benefits if the death was a result of criminal act, 1-800-762-3716
- _ Office of Financial Recovery (OFR) – If you are responsible for the deceased's estate, you must send notification of the death to WA State's Office of Financial Recover. This office is part of DSHS/Medicaid, 1-800-562-6114

Notify Financial Companies

- _ Bank, saving and loan associations, and credit unions
- _ Credit card and merchant card companies (orders a copy of the credit report to ensure all creditors have been notified)

_ Mortgage companies and lenders
_ Financial Planners and stockbrokers
_ Thrift Saving Program, (www.tsp.gov) 1-877-968-3778 (if decedent is formerly military or former federal civil service employee)

Notify Insurance and Annuity Companies

_ Life insurance and annuity companies
_ Employee Pension providers
_ Health, medical, and dental insurance companies
_ Disability insurer
_ Automobile insurance
_ Home owners insurance
_ Umbrella insurance

Notify Utility Companies

_ Electric
_ Gas or propane
_ Water
_ Sewer
_ Home Owner's Association (HOA)
_ Alarm company
_ Cable
_ Phone
_ Internet

Notify Credit Reporting Agencies

There are three (3) national credit reporting agencies which you should notify of the death and instruct them to list ALL accounts as "CLOSED. ACCOUNT HOLDER IS DECEASED". You may also request a credit report to obtain a list of all creditors and to review recent credit activities along with a copy of the death certificate. Additionally you need to send proof that you are authorized to act on behalf of the individual, such as a legal document with a court seal indicating you are the executor of the estate.

-**Experian**, www.experian.com

Ph: 1-888-397-3742

Mailing: P.O. Box 2002
Allen, TX 75013
(NFCO--National Foundation Credit Counseling, 1-800-388-2227)

Equifax Information Services LLC, www.equifax.com
Ph: 1-800-685-1111, Fax: 1-888-826-0823 (GCC--Global Consumer Care)
Mailing: Equifax Global consumer Services,
Attn: Atlanta Support
PO Box 740241
Atlanta, GA 30374

- **TransUnion LLC**, www.transunion.com/myoption
1-800-888-4213
2 Baldwin Place
P.O. Box 1000
Chester, PA 19022

Department of Licensing (DOL)

Take one original Death Certificate to DOL and they will put a code in the system that your loved one has passed away.

Memberships

- Professional and alumni association, and unions
- Health clubs
- Automobile clubs (i.e. AAA)
- Wholesale warehouse clubs (i.e. Costco, Sam's club)
- Rotary, Kiwanis, Lions, Veterans' organizations and clubs

DO NOT CONTACT LIST

You can add the decedent's name on the "Deceased Do Not Contact List" which is maintained by the Direct Marketing Association. There is no cost associated with this. All members of the Direct Marketing Association will delete the decedent's name from their mailing lists once the name is posted. The following website will permit you to register name: www.ims-dm.com/cgi/ddnc

Other

- Newspaper
- Magazine Subscriptions
- County auditor to change titles for homes and cars

For More information in Dealing with Death visit:
http://www.atg.wa.gov/dealingwithdeath/default.aspx

Important dates to remember

- File federal estate taxes within 9 months (one 6 month extension is permitted if requested prior to the due date and the estimated correct amount of tax is paid before the due date) to ensure portability (to transfer some or all of the $5.43

million exemption from spouse). This was put into place by the American Taxpayer Act of 2012.

- If receiving SGLI and DG, only have one year (exactly 365 days) from payout to place the funds in a Roth IRA's or educational accounts under Heroes Earning Assistance and Relief Tax Act of 2008 (HEART Act).

Tax Documents

A Military Survivor who is missing the W2 for the active duty deceased military member for the 2014 tax year (or prior) can simply order it via mail, fax, or email for Deceased Active Duty W2 (Not the Survivor's W-2 or Retiree 1099-R) via:

Mailing address:

DFAS, US PAY
P.O. Box 7131
London, KY 40742-7131

Phone: 1-800-321-1080
Fax: 1-317-275-0353
Email: www. DFAS.BEAN.JFL.MBX.AMPO-CASUALTY@dfas.mil

They will need you to provide:
Full Name:
SSN:
Date of Death:
Attach: A copy of a Death Certificate
Next of Kin – Full Name:
Address:
Contact Phone #:

Receiving your 1099-R tax forms from Defense Finance and Accounting Service (DFAS):

- *myPay* – Log into https://mypay.dfas.mil. Access your 1099-R from the main menu: by clicking on the: tax statement 1099-R". View, print and save your tax statement. If you have trouble reading the graphic version, click on the "text version" link. Military retirees also have access to the current year's tax statement and the five years prior.
- *Telephone self-service* – This automated option easily allows military retirees and annuitants to have their 1099-R mailed to their address DFAS has on record. This can be used 24 hours a day and 365 days a year. Just call 1-800-321-1080; select option #1 to request your 1099-Rand enter your Social Security Number when prompted. Within 3 business days your 1099-R should be in the mail. If your address is no longer current, ask for the DFAS form described below that will allow you to update your mailing address on record.

- *Ask DFAS* – Military retirees annuitants can enter their email address, update their permanent address of record, or enter a temporary mailing address and then submit request for their 1099-R through Ask DFAS. There is no password or login needed with this method. It will take 7 to 10 business days to receive your 1099-R at the mailing address you specify in your request. To use Ask DFAS, visit: https://www.dfas.mil/retiredmilitary/manage/taxes/getting1099r/viaaskdfas.html. Click on where it says "here" to fill out the information requested and then click submit.
- *Written request* – These requests typically take 30 to 60 days to process. Written request must include the retiree's or annuitant's name, SSN, signature and date. To receive a 1099-R, retirees and annuitants must mail their request to the following:

    - Retirees:
      DFAS, US Military Retired Pay
      8899 East 56th St.
      Indianapolis, IN 46249

    - Annuitants:
      DFAS, US Military Annuitant Pay
      8899 East 56th Street
      Indianapolis, IN 46249

- *Fax request* – to 800-469-6559 these requests also typically take 30 to 60 days to process. Requests can either be written, Military Retired Pay, 8899 East 56th Street, Indianapolis, IN 46249 and available at: http://www.dfas.mil.dfas.retiredmilitary.forms,html. Written requests must include the retiree's or annuitant's name, SSN, signature and date.
- *Call DFAS* – A DFAS customer care representative can be reached at 1-800-321-1080. Customer Service hours are Monday through Friday 8 am – 5 pm EST.

Other Resources Information

- National Resources Directory – www.natioanlresourcesdirectory.gov. This directory is an online partnership for wounded, ill and injured service members, veterans, their families and families of the fallen and those that support them.
- Listing of VA National and State Veterans Cemeteries – www.cem.na.gov
- Military Funeral Honors contact JBLM Casualty Assistance Center 253-966-5890. Families of eligible veterans may request funeral honors through their funeral director. The funeral director must contact the appropriate military service to arrange for the funeral honors detail.
- Survivor Outreach Services – www.sos.army.mil. This is an Official Army program designed to provided long term support to surviving Families of the Fallen

- Navy Gold Star Program – www.navygoldstar.com
- Coast Guard Survivor Benefits – www.uscg.mil/ppc/ras/abp/asp
- Air Force Survivor Benefits – www.retiree.af.mil/sbp or www.mortuary.af.mil
- U.S. Department of Defense Resources – www.defense.gov/resources. This site connects service members, military families and veterans to all the benefits of service-government benefits, scholarships, discounts and more.