

Surviving Spouse Checklist

<http://www.military.com/benefits/survivor-benefits/military-retiree-survivor-checklist.html>

The following checklist should be reviewed by military retirees and their beneficiaries on an annual basis. This checklist is designed to equip you and your loved ones with knowledge and information that may prove helpful. While it may be impossible to truly prepare for the overwhelming emotions and dilemmas that arise with the loss of a loved one, it does help when most of the below issues have been put into place.

__ Create a military file that includes your retirement orders, separation papers, medical records, etc. Make sure your spouse knows the location and telephone number of the nearest military installation.

__ Create a military retired pay file that includes the pertinent information for DFAS

(This file should also include the number of any VA claim still pending and the address of the VA office being used; a list of deductions currently being made from benefits; and the name, relationship and address of the person you have made the beneficiary of any unpaid retired pay at the time of death.)

__ Create an annuities file. This file should have information about the Survivor Benefit Plan (SBP), Reserve Component Survivor Benefit Plan (RCSBP) or the Retired Serviceman's Family Protection Plan (RSFPP), Civil Service annuity, etc. Additional information regarding SBP annuity claims can be obtained from the DFAS-Cleveland office at 800-321-1080.

__ Create a personal document file that has copies of marriage certificates, divorce decrees, adoptions and naturalization papers.

__ Create an income tax file. Include copies of your state and federal income tax returns.

__ Create a property tax file. Include copies of tax bills, deeds and any other related information.

__ Create an insurance policy file. Include life, property, accident, liability and hospitalization policies.

__ In a secure location, maintain a list of all bank accounts (joint or individual). Include the location of all deposit boxes, savings bonds, stocks, bonds and any securities owned.

__ In a secure location, maintain a list of all charge accounts and credit cards. Include account numbers and mailing addresses.

__ Maintain a list of all associations and organizations of which you are a member. Some of them could be helpful to your spouse.

__ Maintain a list of all friends and business associates who may be helpful. Include name, address and phone number.

__ Spend time with your spouse discussing your plans with respect to the type and place of your funeral service. You should decide which cemetery, whether ground burial, or cremation, etc. If your spouse knows your desires, it will resolve some of the questions that might arise at a later date.

__ Visit a local funeral home and pre-arrange your services. Many states will allow you to pre-pay for services.

__ Investigate the decisions that you and your family have agreed upon.

Many states have specific laws and guidelines regulating cremation and burials at sea. Some states require a letter of authority signed by the deceased in order to authorize a cremation. Know the laws in your specific area and how they may affect your decisions. Information regarding Burials at Sea can be obtained by phoning the Navy Mortuary Branch within the Navy Casualty Assistance Division ensures prompt and uniform death benefits are provided to all Navy beneficiaries worldwide. Included as be at 866-787-0081.

__ Once your decisions have been made and you're comfortable with them, have a will drawn up outlining all your wishes.

__ Insure that your will and all other official documents are maintained in a secure location known by your loved ones. This includes all of your DD214s or Retirement Orders.

__ When all the decision-making and documenting is completed, sit back and continue to enjoy life.

Who should be notified in the event of my death?

1. Defense Finance and Accounting Service - 800-321-1080 or 216-522-5955/800-269-5170

2. Social Security Administration (for death benefits) - 800-772-1213

3. Department of Veterans Affairs (if applicable) - 800-827-1000
4. Office of Personnel and Management (OPM) (for Federal Employees) - 888-767-6738
5. Any fraternal group that you have membership with: e.g., MOAA, FRA, NCOA, VFW, AL, TREA
6. Any previous employers that provide pension or benefits.
7. Burial at Sea information - 866-787-0081

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Contact information for all retiree services:

Defense Finance and Accounting Service
 8899 East 56th Street
 Indianapolis, IN 46249-1200
 800-321-1080 or (216) 522-5955/800-269-5170
 (for deceased members)

Department of Navy Retired
 Activities Branch
 OPNAV N170C
 5720 Integrity Drive
 Millington, TN 38055-6620
 866-827-5672

U.S. Army
 Army Retirement Services Office
 251 18th Street South
 Suite 210
 Arlington, VA 22202-3531
 703-571-7232

U.S. Air Force
 AFPC/DPFFF
 550 C Street W
 JBSA-Randolph, TX 78150
 800-525-0102

U.S. Marine Corps
 Manpower Management Division
 Separation & Retirement (MMSR)
 3280 Russell Road
 Quantico, VA 22134-5103
 703-784-9304

U.S. Coast Guard
 Commanding Officer (RAS)
 U. S. Coast Guard
 Pay & Personnel Center
 444 SE Quincy St
 Topeka KS 66683-3591
 800-772-8724

*** Please know that this is a basic military checklist. You should include in your package all civilian related information not