

Retirees Casualty Assistance Checklist

As of date _____

Retirees Name _____ SSN _____

Military Grade _____ Date of Retirement _____ Branch of Service _____ Years of Service _____

Address _____ City _____ State _____ ZIP _____

DOB _____ Place of Birth _____

Spouse's Maiden Name _____

Date of Marriage _____ Place of Marriage _____

Father's Name _____ DOB _____ Place of Birth _____

Mother's Maiden Name _____ DOB _____ Place of Birth _____

Documents needed to claim death benefits (Check them off and note location of each)

___ Copies of report(s) of separation from active duty (DD Form 214, etc.) _____

___ Copies of retirement orders _____

___ Copies of birth and death certificates _____

___ Beneficiaries birth certificate(s) and marriage and/or divorce data _____

___ Social Security data (see Part III)

___ VA insurance data (See Part I)

Plus -- You should always have the following documents on hand (note location of each):

Updated will and letter of instructions _____

Names of banks, credit unions, etc. (account numbers) _____

Updated list of assets and liabilities _____

Insurance policies, numbers, instructions, payments, etc _____

Adoption or naturalization papers (if applicable) _____

Part 1 - Veterans Administration Data (if applicable)

VA Compensation \$ _____ Disability claim # _____

Remarks _____

VA Insurance policy Nr(s) _____ File Nr _____

Type _____ Amount \$ _____ / _____

Location of policies _____

Any known paid-up add'l VA Insurance \$ _____ As of Date _____

Other Remarks _____

Veteran's claim Nr(s) (other) _____ Patients data card # _____

Part II - Retirement Pay Data (see retiree account statements)

Retiree pay data: (as of date) _____

Gross pay \$ _____

Deduction \$ _____ For _____

Deduction \$ _____ For _____

Deduction \$ _____ For _____

Deduction \$ _____ For _____

Net Pay \$ _____ Taxable Income \$ _____

Survivor coverage Information

Survivor benefit plan annuity \$ _____ SBP Base Amount \$ _____

Supplemental SBP (if any) \$ _____ Effective _____

RSFPP annuity \$ _____

Part III - Social Security (when Applicable)

Social Security Claim # _____ Month filed _____

Type of benefit(s) _____ Beginning month of entitlement _____

Amount monthly \$ _____ Bank and acct. # (direct deposit) _____

Note: No payment is payable for the month of death (call local SSA office)

Part IV - Miscellaneous (Things to know and plan for upon death of a retiree)

Disposition instructions for the body (burial, cremation, memorial service, etc.)

Information required for Death Certification. (Date/Place of birth, Father's Name, Mother's Maiden Name, etc.)

Information required for obituary notice (names, relation & locations of appropriate relatives, etc.)

Widows will need a new ID card (military, medical, commissary, base exchange, etc.). Necessary changes in your DEERS

program will have to be made (Tricare, etc.)

It may take several months to clear estates (you may require at least 8 copies of death certificate)

Contents of your safety deposit box should be known (and make sure the box number, its location and location of the key are known). Direct deposit of Social Security benefits & military retirement payments (entitlements) must be immediately changed. Named beneficiaries on insurance policies become very important (keep current)

There may be some entitlement to burial benefits (headstone, payments, etc.) (Check VA), Check VA for Presidential Memorial Certificate , an American flag can be obtained (check VA and Post Office)

The survivor should update appropriate will, Extra credit cards should be destroyed or canceled

Appropriate changes should be made to all joint ownership's . Contact insurance companies as appropriate

Be prepared to turn in Retirees ID Card (Where and when required)

Note: Make every effort to retain "original" documents (Provide certified copies whenever possible)

Fill in and keep the following office phone numbers (Update periodically):

Casualty Assistance _____ Retiree Activities _____

Retiree Activities _____ Hospital (Military) _____ Legal Office (Military) _____

VA Hotline 1-800-827-1000 Social Security Hotline 1-800-772-1213 Family Sup Ctr _____

Finance (Retiree Pay) _____ SBP _____ ID Card/DEERS Renewal _____

Note: Spouse/Next of Kin should have a copy of this document or know where to locate it. Consider letting a third party (family member) know where it is in case something should happen to both the retiree and spouse or Next of Kin at the same time.