



Military Retiree/Veterans

“My Personal Affairs Planning Guide”

Prepared for: _____

Compiled by

Military Retiree Council at Redstone Arsenal, AL 35808

<http://www.garrison.redstone.army.mil/>

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(A simple, easy to use checklist to annotate your military career information, family data, insurance policies, financial data, and other information. When completed, members of your family will have what they need to help settle your estate, funeral and burial actions, meeting your personal desires. Upon completion it is recommended that you provide each member of your family a copy, but that's your choice. Also place a copy for safe keeping (along with your Wills/Discharge (DD214) Papers.)

(Note: A detailed 26 page Survivors plan at: <http://www.narfe.org/pdf/f-100.pdf> sponsored by National Association of Retired Federal Employees, NARFE). References: Military Personnel Office -Redstone Arsenal, Army Community Service, several Huntsville area Funeral Homes, Still Serving Veterans, VA National Cemetery, Tutt Fann Veterans Home, various local veteran organizations. Compiled by: CW3 Alfred Reed (US Army Retired)

(1)

Essential that you ATTACH A COPY OF YOUR DISCHARGE (DD214 or Other)

Mil Retiree/Vet Planning Guide and References

Pre –Deceased Section - Part 1

(To be completed by retired Service Member/Spouse - for Death Certificate, Obituary, Eulogy)

***Name-Phone number for Assistance:** _____

(Could be Minister or family or Military Casualty Assistance or Funeral Home, if pre-arranged)

***Executor of the Estate/Will:** _____

Veterans Information: (For Death Certificate & Newspaper)

Full Name (Incl Middle): _____ Retired Rank: _____

Social Security Number: _____ Old/New Mil Service Number: _____

Date of Birth: _____ Place of Birth: _____ Home Phone: _____

Home Address: _____ County: _____

Organ Donor: Yes/No Is there a Will: Yes/No Living Will: Yes/No Power of Attorney: Yes/No

Receiving Social Security: Yes/No (Active-Retiree Wills/POA can be provided by on-post Legal Offices)

Date Entered Military: _____ Date Separated/Retired: _____

Military Retired Pay: Yes/No VA disability: Yes/No Long Term Care Policy: _____

Check: Married: Widowed: Divorced: Never Married:

Current Spouse: _____ (Maiden Name): _____

Eligible for Survivors Benefit Plan: Yes/No Civilian Pension: Yes/No Cell Phone#: _____

Place of Marriage: _____ Spouse SSN: _____

Divorced Spouse: _____ Date of Divorce: _____

Mothers Name: _____ Fathers Name: _____

Children: (Names/Birthdate/Address)

(1) _____

(2) _____

(3) _____

Physician: _____ Minister: _____

Financial Advisor: _____ Lawyer: _____

(2)

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Funeral Arrangements: Part 1 Continued:

****Has the funeral been "Pre-arranged", ifso Name, Phone Number, Policy #:**

Do "You" want Burial or Cremation: _____ Do you want a Memorial Service: Yes/No

Place of Funeral Service: _____

Place of Visitation: _____

Place of Burial: _____ Plot Purchased? Yes/No

Special Persons Notifications: _____

(Suggest a listing or "roll call" or "call chain" of who calls who)

Do you want Military HonorGuard requested: Yes/No

Do you want Patriot Guard Riders or other "Special Groups/Organizations": _____

Do you want to be buried in Uniform, If available? : Yes/No

Do you want burial in a National Cemetery: Yes/No www.cem.va.gov/ : _____

Employers Name/Phone/Supervisor: _____

Documents & Location (Needed immediately):

____ DD 214 (Active Duty Discharge)

____ Power of Attorney (Not Valid after death)

____ Living Will (if you are incapacitated)

____ Current Will (with Addendum for bequests)

____ Pre-Arranged Funeral Home Policy

____ Burial Plot Policy/receipt

____ Insurance policies (to pay expenses)

____ Is a Guardian Appointed for Minors/Disabled

____ Obit/Eulogy

____ Special Readings

____ List of organizations/groups to notify

____ Special Traditions to Follow

Part 2

UPON THE DEATH OF YOUR VETERAN

(Funeral Section - for Death Certificate, Obituary, Eulogy)

***Note-These actions will be assisted by your chosen Funeral Home/Director**

To be done immediately:

Encourage delay in social media posting until after this step

Call 911 If death occurs at home. (The Police will assist with notifications)

Select and/or notify the Funeral Home (*If pre-arranged, most decisions will have been made, just call their contact Phone# _____)

If your Veteran is an Organ Donor ensure the Mortuary is informed, if the Veteran has passed in a hospital or at home with Hospice, ensure they are aware of "organ donor" status

Make immediate family and close friend notifications; let others help you (**Use call tree**);

To be done next day : (With Funeral Director assistance & Completed PART 1):

Remember that the VA does "NOT" cover all costs of a veteran's funeral. (Plot, Vault, Opening/closing and Flag.) Details and pricing options will be provided by the chosen Funeral Director and/or www.cem.va.gov/.

Establish contact with chosen Funeral Home, meet with Director and Focus on the funeral/memorial service, dates and times, financials. (Take someone you trust with you to help with decision making. Decide in advance the maximum amount you can spend)

If military cemetery is desired, the Funeral Director will help. The US Department of Veterans Affairs National Cemetery Administration website has a listing by state with contact information.

<http://www.cem.va.gov/cems/nchp/alabama.asp> or call: 1 (800) 827-1000 (Recent change: Pre-eligibility of grave sites **IS NOW** allowed, also note, a spouse can be buried in a National Cemetery)

Start several "to do" and thought lists. A "last wishes" list. Are there things that your loved one would have liked or preferred? Write it down.

If you have ties to another geographical area or home town, consider posting obituary there as well. Watch the cost of the obituary, it can add up quickly.

If there will be an open casket, select what your Veteran will wear. If it is a uniform, seek help from another Veteran or Veterans Organization to ensure that it is properly displayed. If you want anything else placed in the casket, such as a cross or rosary, ensure that it, along with clothes are delivered to the Funeral Home as soon as practical.

Part 2 Continued:

The degree of military honors afforded an Active/Retiree/Veteran vary. The Funeral Director will be able to help. Other resources include the Casualty Assistance Office on your nearest Base, Military OneSource <http://www.militaryonesource.mil/family-and-relationships/casualty-assistance-and-surviving-loss> or contact the Military Cemetery Administration at <http://www.cem.va.gov/> or 1 (800) 827-1000.

Consider requesting the presence of Patriot Guard Riders, American Legion, or VFW. These are dedicated group of Veterans and volunteers who will provide a military presence at Veteran and Military Services. Support can be requested on their website at: <https://www.patriotguard.org/content.php>

Within a Few Days: Important notifications/Contacts:

Notify anyone who was sending your Veteran checks including retirement(s), social security, or employer. Here are some common numbers:

Army - Ft Rucker Casualty Assistance (334) 255-9081 (24 hour automated line), or Benefits (334) 255-9005

Redstone Casualty Assistance (256) 876-4252, (256) 824-2718

Navy 1-800-368-3202 Air Force 1-800-433-0048 Marine Corps 1-800-847-1597

Coast Guard 1-800-772-8724 Redstone ID card Section 256-842-2413 or 256-313-0018

___ Army Emergency Relief 256-876-5397 (For emergency funds for immediate needs of survivors)

___ Defense Finance and Accounting Services (DFAS) 800-321-1080

___ DEERS/ID Card/Medical Update 800-538-9552

___ Office of Personnel Management (For federal civilian employees) 1-888-767-6738

___ Social Security 1-800-772-1213 (there may be a \$255 benefit)

___ Veterans Administration 1-800-827-1000 (there may be a burial benefit, Headstone, Certificates)

___ Employer's Human Resource Office (they will also be able to help on life insurance, cancelation of medical insurance, and/or payment of any unpaid salaries/benefits)

"Locate" the following documents (in addition to those in Part 1):

___ Military Retirement Orders ___ Previous Death Certificates ___ Retired Pay Statements

___ VA Disability Paperwork ___ Marriage Certificates ___ Safe Deposit Box

___ Divorce Decrees/Pre-Nups ___ Citizenship/Passports Papers ___ Real Estate Deeds

___ Birth/Adoption Certificates ___ Bank Acct Statements ___ Tax Returns

___ Vehicle Titles & Registration ___ Insurance Policies ___ Investment Statements

___ On Line/Computer passwords (phone, Banking, Facebook, etc)

“Pay” the following (or be prepared to Pay):

Funeral Expenses (Average cost \$3500-\$12,000) Income taxes (regular filing time frame)
 Burial Plot/Urn/Vault Current or Urgent Bills Monument/Marker for the gravesite
 Clergy Organist Florist Transportation Clothing Ambulance

Follow-on Actions Part 3

Within a Few Weeks:

Consider both ID Theft and Social Media. Notifications can be made to Credit Reporting agencies such as TransUnion or Experian for a death to prevent ID theft. Social Media Sites you should close accounts and reopen a new if desired or as a minimum change the passwords as soon as possible.

The Funeral Director will order Certified Death Certificates. Order 6 to 10 copies for financial and insurance companies. Many organizations require “certified copies” (with raised seal), but some will accept scanned images.

Notify all life insurance companies. Research to see if there are small “add on” policies that might be associated with such things as Credit Union membership, bank accounts, or through your employer.

Notify home insurance company. Notify auto insurance company

Notify your banking and your mortgage holder institutions. They will require a copy of the death certificate to make changes to joint accounts.

Request new debit card (if you use one) and delete all others once it arrives. (Note: This will force service providers to contact you to continue charging to automatic payment accounts)

Notify creditors including credit card issuers. **Caution:** if the card/account is only in the Veterans name, some companies will immediately turn off the card and you will not have access to the services. If you need the card, delay the notification until you can establish one in your own name.

Decide whether a lawyer will be required to assist with probate or estate handling. While expensive, getting good legal advice can be invaluable during this critical time. If retired military, On-Post Legal Office may be able to help or refer.

If you have home security system, notify provider.

Cancel email and website accounts, if possible. If not, they will just become inactive over time. Change the passwords for major accounts like Amazon, Apple, etc., even if they are in your name alone.

If you have had a joint checking account, consider whether you want to add someone you trust onto the account in case of emergency. Make this decision carefully. Death Certificate will be needed.

Review your wills and/or trusts to reflect your new status and desires (May not be required)