

Army Retiree Check List for Survivors

This checklist is designed to help 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, DD-214, 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 and Army Personnel Command:

Defense Finance and Accounting Service

U S Military Retirement Pay

Post Office Box 7130

London, KY 40742 7130

(800) 321-1080 or (216) 522-5955/800) 269-5170 (for deceased members)

DEPARTMENT OF THE ARMY

Retirement Services Office

200 Stovall St.

Alexandria, VA. 22332-0470

(703) 325-9158

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 1-800-321-1080.

__ Create a personal document file that has copies of your Will, 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, whether or not you want Military Funeral Honors, 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.

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 DD-214s or Retirement Orders.

Who should be notified in the event of my death?

1. Defense Finance and Accounting Service – (800) 321-1080 or (216) 522-5955 or (800) 321-1080 Fax: (800) 469-6559
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) (if applicable) (724) 794-8690

5. Any fraternal groups that you have membership with: e.g., MOAA, FRA, NCOA, VFW, AL, TREA

6. Any previous employers that provide pension or benefits.

7. Funeral home and Military Funeral Honors

The above information is not all-inclusive and should be used with other estate planning tools to lessen trauma to your loved ones. If you have other suggestions that might prove helpful and would like to share them with your fellow retirees, send them to your Retired Services Office.

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(703)325-9158

*** Please know that this is a basic military checklist. You should include in your package all civilian related information not cited above that would assist your beneficiaries in carrying out your last will.

RETIREMENT SERVICES FORT DRUM
Clark Hall, Bldg 10720 Room A1-21
Fort Drum, NY 13602
Office: (315) 772-6434/6339
Fax: (315) 772-3885