

SURVIVOR'S ASSISTANCE GUIDE:



RETIREEES & VETERANS

Fort Knox Casualty Assistance Center
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Section I. Survivor Assistance for United States Army Retired. The Army provides survivor assistance to the primary next of kin of all deceased Soldiers. The survivors of United States Army retired Soldiers are entitled to assistance the same as Soldiers who die while on active duty. This guide is designed to assist the survivor in settling the affairs of the deceased retiree. The retiree's service to the United States contributed to our Nation's strength and their survivors deserve our support.

Section II. Reporting Retiree Deaths. Each service is responsible for providing survivor assistance to their own Soldiers. Call the applicable service below to report a retiree death:

Casualty Offices:

Army, Army Reserve, and Army National Guard (502) 624-6051 (Fort Knox).

Air Force (757) 764-5231 (weekends/holidays) (757) 764-5411.

Marine Corps, Navy, and Coast Guard (757) 322-2817 (weekends/holidays)
(757) 322-2866/2867.

Casualty Assistance Centers will submit a casualty report which will stop the retiree's retired pay. The next of kin may also telephone Defense Finance and Accounting Service Cleveland at (800)-321-1080 to report the retiree's death. Any check received after the retiree's date of death will have to be returned to the Defense Finance and Accounting Service Cleveland. Once the Defense Finance and Accounting Service Cleveland is notified of the death, all applicable claim forms will be mailed to the beneficiary. These forms will usually arrive within 21-28 days.

Section III. Deceased Retiree's Unpaid Pay and Allowances. The deceased retiree's designated beneficiary or surviving next of kin is authorized payment of the deceased's unpaid portion of retired pay. This is the retiree's pay starting from the first day of the month through the date of the retiree's death. This pay is requested using SF 1174, Claim for Unpaid Compensation of Deceased Member of the Uniformed Services. Complete SF 1174, include a copy of the retiree's death certificate, and mail to: Defense Finance and Accounting Service, United States Military Annuitant Pay, 8899 E. 56th Street, Indianapolis, IN 46249-1300.

Section IV. Survivor Benefit Plan. If the deceased participated in the Survivor Benefit Plan, the surviving spouse or dependent child may be eligible for an annuity. To apply for the annuity, complete DD Form 2656-7, Verification for Survivor Annuity, SF 1199A, Direct Deposit Sign-up Form, and Form W4P, Withholding Certificate for Annuity Payments.

These forms, along with a copy of the retiree's death certificate, should be mailed to: Defense Finance and Accounting Service, United States Military Annuitant Pay, 8899 E. 56th Street, Indianapolis, IN 46249-1300.

Section V. Veteran's Administration. Report the retiree's death to the Veteran's Affairs at (800)-827-1000 and inquire about benefits or visit their website at: <https://www.va.gov/>.

a. Veterans Affairs National Cemeteries. Burial benefits in a Veteran Affairs National Cemetery for eligible veterans and some dependents include the gravesite, a headstone or marker, opening and closing of the grave and perpetual care. Many national cemeteries have a columbaria or gravesites for cremated remains. Contact the Veterans Affairs for further information or visit the National Cemetery Administration website at: <https://www.cem.va.gov/>.

b. Headstones and Markers. Veteran Affairs National Cemetery Administration provides headstones or markers for the graves of veterans anywhere in the world and of eligible dependents buried in military posts, state veteran or national cemeteries. When burial occurs in a cemetery other than a military post, state veteran or national cemetery, the headstone or marker must be requested from the Veteran Affairs. It is shipped at government expense, but the cost of placing the headstone or marker is the responsibility of the survivor. To apply, complete VA Form 40-1330, Claim for Standard Government Headstone or Marker available at the Veteran Affairs National Cemetery Administration website: <https://www.cem.va.gov/> and mail to: NCA FP EVIDENCE INTAKE CENTER, PO Box 5237, Janesville, WI 53547. Telephone (800) 697-6947 for additional information.

c. Presidential Memorial Certificates. Presidential Memorial Certificates express the Nation's recognition of a veteran's service. Certificates bearing the signature of the President are issued honoring deceased veterans with honorable discharges. Eligible recipients include next of kin and other loved ones. The award of the certificate to one eligible recipient does not preclude certificates to other eligible recipients. To establish honorable service, the documents listed below may be used to establish honorable active military service. The National Cemetery Administration will accept the following documents, with some exceptions to verify eligibility when requesting a headstone or marker. Contact the local Veteran Affairs office for assistance.

(1) DD Form 256, Honorable Discharge Certificate or DD Form 257, General Discharge Certificate must indicate a period of active-duty service dates to be a valid document for eligibility determination purposes. Valid only if active-duty service dates are indicated.

(2) The DD Form 214, Certificate of Release or Discharge from Active Duty has been issued by all military services since January 1, 1950. Before January 1, 1950, several similar forms were used by the military services.

(3) The NGB Form 22, National Guard Bureau discharge document can be used to verify eligibility if it indicates prior active federal service other than for training or a minimum of 20 years total service for pay.

d. Reimbursement of Burial Expenses. Veteran Affairs will pay up to \$2,000 toward burial expenses for deaths on or after September 11, 2001. If the Veteran is buried in a Veteran Affairs National Cemetery Administration, some or all the cost of transporting the deceased may be reimbursed.

(1) Veteran Affairs will pay up to \$796 toward burial and funeral expenses for deaths on or after October 1, 2019 (if hospitalized by Veteran Affairs at time of death), or \$300 toward burial and funeral expenses (if not hospitalized by Veteran Affairs at time of death), and a \$796 plot-interment allowance (if not buried in a national cemetery). For deaths on or after December 1, 2001, but before October 1, 2011, Veteran Affairs will pay up to \$300 toward burial and funeral expenses and a \$300 plot-interment allowance. For deaths on or after April 1, 1988, but before October 1, 2011, Veteran Affairs will pay \$300 toward burial and funeral expenses (for Veterans hospitalized by Veteran Affairs at the time of death).

(2) Complete VA Form 21P-530, Application for Burial Benefits (<https://www.vba.va.gov/pubs/forms/vba-21p-530-are.pdf>) and submit to the nearest Veterans Administration office or contact (800) 827-1000 for further information.

e. Dependency and Indemnity Compensation. To be eligible, the deceased must have died from: a disease or injury incurred or aggravated while on active duty or active duty for training, or an injury incurred or aggravated in line of duty while on inactive duty training; or a disability compensable by Veteran Affairs. All eligible survivors (unmarried surviving spouse, unmarried children under 18, and handicap children between 18-23 attending a Veteran Affairs approved school or low-income parents of deceased service members/veterans) may apply.

(1) Veterans with a total service-connected disabled at the time of death, but their death was not the result of their service-connected disability, the survivor may qualify if: the veteran was continually rated disabled for 10 years or more immediately preceding death; or the veteran was so rated for five years from the date of military discharge; or was a former prisoner of war who died after September 30, 1999 and who was continually rated totally disabled at least one year preceding death. The discharge must have been under conditions other than dishonorable. For further information, contact (800) 827-1000.

Section VI. Social Security. Social security payments may be made to eligible survivors of deceased retirees if survivors meet one of the following requirements:

a. Surviving children under age 18 or those 18 or over who become totally disabled before reaching the age of 22.

b. Widow(er) of the deceased at any age if he/she has care of a natural or legally adopted child under 16 or a disabled child.

c. Widow(er) on reaching age 60.

d. Surviving divorced husband or wife at age 60 if he/she was married to the Soldier for at least 10 years.

e. Surviving divorced mother or father who is not married and has in care a natural or legally adopted child who is under age 16 and entitled to social security benefits on the Soldier's record.

f. Dependent parents on reaching age 62 if they were receiving at least one-half of their support from the deceased Soldier.

g. Apply at the nearest social security office. Contact (800) 772-1213 to find the office nearest you and inquire about benefits. Make sure you have the following documents: Department Defense form 214, Certificate of Release of Discharge from Active Duty, previous year's Form W2 Wage and Tax Statement, marriage certificate (original or certified copy), divorce papers (if applicable), birth certificates (original or certified copy), and a copy of the death certificate.

h. A lump sum death payment of \$255 is payable if the deceased, at time of death, was fully or currently insured for social security payments. The lump sum death payment is paid in the following order of priority:

(1) The widow(er) living in the same household as the deceased at time of death.

(2) The widow(er) who was eligible for benefits based on the deceased member's record for the month of death.

(3) In equal shares to each child who was eligible for benefits based on the deceased member's record for the month of death.

Contact the nearest social security office or the above number to see if you qualify. Visit the Social Security Office website for more information at: <https://www.ssa.gov/>.

Section VII. Life Insurance. Gather all life insurance policies. Check safe deposit boxes, files or papers kept by the retiree. Civilian insurance policies should have a company or agent to contact. Contact the company or agent, report the retiree's death, and ask for instructions on how to apply for the benefit. Usually, the death certificate and a claim form or letter with pertinent information on the deceased and beneficiary is needed in order to pay the claim.

Section VIII. ID Cards. Survivors eligible for DD Form 1173, Uniformed Services Identification and Privilege Card should have new cards issued under their new status as soon as possible. You will need a copy of the death certificate, marriage certificate, retirement orders and copies of birth certificates for eligible children. Contact the nearest military installation ID card section for details. They service all branches of the Armed Forces. You may address questions to the Fort Knox Identification Card Section at (502) 624-1526.

Section IX. Funeral Honors. The Fort Knox Casualty Assistance Center is responsible for providing military funeral honors to eligible deceased Army personnel within the states of Ohio, Indiana, Kentucky (60 counties), Michigan (69 counties) and West Virginia (47 counties). This includes Active duty, Army Reserve, National Guard, retirees and veterans. Full military funeral honors will be provided for all Active-Duty Soldiers and Medal of Honor recipients.

a. A full military funeral honors team consists of nine Soldiers who serve as the firing team (also act as pallbearers at the gravesite), an officer or noncommissioned officer in charge, a chaplain (if required, subject to availability), and a bugler to render Taps.

b. Funeral honors for all other Army veterans will consist of two members to fold and present the flag and present render Taps.

Section X. Federal Service. If the deceased retired from federal service, the survivor may qualify for benefits. Contact the Office of Personnel Management Retirement Services at (888) 767-6738 to report the retiree's death and inquire about benefits.

Section XI. Death of an Annuitant. If a person receiving an annuity from a deceased member's military retirement and he/she dies, report his/her death to the Defense Finance Accounting Service at (800) 321-1080. This will stop the annuity pay. Defense Finance and Accounting Service will mail them a claim for any unpaid money due to the designated beneficiary. Complete the form and return to Defense Finance and Accounting Service for payment. Any check received after the date of death will have to be returned to Defense Finance and Accounting Service.

SECTION XII. Casualty Assistance Checklist. To be completed by retirees and spouses and maintained for survivor's use.

Soldiers Name: _____

Social Security Number: _____

Date of Birth/Place of Birth: _____

Date of Retirement/Retired Grade/Rank: _____

Enrolled in: Retired Serviceman's Family Protection Plan/Survivor Benefit Plan / Supplement Survivor Benefit Plan (circle all that apply).

Did you disenroll from this pay: Yes No (circle one).

Veteran Affairs Claim #:

Eligible to draw Veteran Affairs Disability Compensation (even if not in receipt now): Yes No (circle one).

Receiving Social Security: Yes No (circle one). If yes, age at which first received:

Organ Donor: Yes No (circle one).

Is there a living will? Yes No (circle one). If yes, location of a copy: _____

Spouse Information.

Name: _____

Date of Birth: _____

SSN: _____

Marriage information.

Date and place of marriage (City, State, Country):

Children Information.

Name/Date of Birth/Incapable of self-support?

Insurance Policy(ies). Policy #; Company; Amount (include 'as of' date); Beneficiary; Agent Phone Number:

INVESTMENTS. Type (Individual Retirement Account, Certificate Deposit, and Mutual Fund); Company Name; Amount (include 'as of' date); Agent Phone Number:

BANK ACCOUNTS. Bank Name; Phone number; Type of Account; Balance (include 'as of' date); Account Number:

Checking account: _____

Savings Account: _____

Other: _____

CREDITORS. Name, Address and Phone Numbers; Account Number; Balance Due (include 'as of' date):

BURIAL INFORMATION.

Who should be notified of your death: _____

Name, Relationship, Address and Phone Number: _____

Do you want to be: Buried Cremated (circle one).

Name of Cemetery in which you wish to be buried: _____

Do you want to be buried wearing your uniform: Yes No.

Do you want a memorial service? Yes No If yes, where: _____

Have you purchased a burial plot? Yes No If yes, where: _____

Do you have preference of funeral homes? Yes No If yes, which one:
(Name and phone number of the funeral home). _____

Do you want military funeral honors? Yes No.

LOCATION OF DOCUMENTS.

Living Will: _____

Current Retired Pay Statement: _____

Marriage Certificate(s): _____

Divorce Decree(s)/property settlement(s) (from previous marriage of retiree or spouse): _____

Death Certificate(s) (from previous married or retiree or spouse): _____

Birth Certificates/adoption papers (retiree, spouse, children): _____

Department Defense Form 214 (Certificate of Release or Discharge from Active Duty): _____

Retirement Orders: _____

Safe Deposit Box(es): _____

LIST CONTENT.

Will: _____

Vehicle Registration: _____

Vehicle Title: _____

Insurance Policy(ies): _____

Investment Documents (Individual Retirement Account, Certificate Deposit, and Mutual Fund): _____

Burial Plot Information: _____

Uniform for Burial: _____

Medical and Dental Records: _____

Real Estate Deeds: _____

Tax Returns: _____

Section XIII. SURVIVOR OF DECEASED RETIREE CHECKLIST. Defense Finance and Accounting Service Cleveland. Contact the Defense Finance and Accounting Service Cleveland at (800) 321-1080 to report retiree's death. They can answer any questions you may have about the retired pay. The Defense Finance and Accounting Service should mail the necessary form(s) needed to apply for any unpaid pay and/or allowances due the retiree.

a. Unpaid Pay and Allowances. Designated beneficiary or spouse is authorized payment of retired pay from the first day of the month through the date of death. Fill out SF 1174, Claim for Unpaid Compensation of Deceased Member of the Uniformed Service and mail, along with a copy of the retiree's death certificate, to Defense Finance and Accounting Service, United States Retirement Pay, 8899 E. 56th Street, Indianapolis, IN 46249-1300.

b. Survivor Benefit Plan Annuity. If retiree participated in plan, annuity is payable to authorized dependent(s). Fill out DD Form 2656-7, Verification for Survivor Annuity, SF 1174, Claim for Unpaid Compensation of Deceased Member of the Uniformed Service, and Form W-4P, Withholding Certificate for Pension or Annuity Payments and mail, along with a copy of the retiree's death certificate, to Defense Finance and Accounting Service, United States Annuitant Pay, 8899 E. 56th Street, Indianapolis, IN 46249-1300.

c. Social Security. Contact the Social Security Administration to report the retiree's death. You may be eligible for benefits, but you must apply. The benefits are determined on a case-by-case basis. Contact the Social Security Office at (800) 772-1213. They will schedule an appointment for you. On the date of your appointment, you may want to arrange to have someone available to assist you. For additional information, visit their website at: <https://www.ssa.gov>.

d. Veterans Administration. Contact the Department of Veterans Affairs to report the retiree's death. You may be eligible for benefits. The Department of Veterans Affairs is available to answer questions about Veteran Affairs benefits at their nationwide toll-free telephone number, (800) 827-1000. Visit their website at: <https://www.va.gov> for additional information.

e. Headstones and Markers. Veterans Affairs provides headstones and markers for the graves of eligible, honorably discharged veterans anywhere in the world. They also provide headstones and markers for eligible dependents of veterans buried in military post, state veteran or national cemeteries. Flat bronze, flat granite, flat marble, upright granite, and upright marble types are available. Niche markers are also available for identifying cremated remains in columbaria. Headstones and markers are inscribed with the name of the deceased, branch of service, and the years of birth and death. Optional items that may be inscribed are military grade, rank or rate, war service, approved emblem of one's belief, and text indicating valor awards. When burial is in a military post, state veteran or national cemetery, the headstone or marker is ordered through the cemetery. When burial is in a civilian cemetery, the headstone or marker may be applied for to the Veterans Affairs. It is shipped at government expense; however, Veterans Affairs does not pay the cost of placing the headstone or marker. To apply, complete Veterans Affairs Form 40-1330, Claim for Standard Government Headstone or Marker, and mail it to: NCA FP EVIDENCE INTAKE CENTER, PO Box 5237, Janesville, WI 53547 or call (800) 697-6947. For additional information on Veterans benefits, visit the website at: <https://www.va.gov>.

f. Life Insurance. Gather all insurance policies, check safe deposit boxes, files or papers kept by the retiree. Civilian insurance policies should have a company or an agent to contact. Contact the company or agent, report the retiree's death and ask for instructions on how to apply for the benefit. Government insurance is listed below.

g. Veterans Group Life Insurance. Veterans Group Life Insurance is insurance the retiree can elect to continue after retirement. To report death or check if retiree is insured, call (800) 419-1473 or write to Office of Servicemembers' Group Life Insurance (OSGLI) PO Box 70173, Philadelphia, PA 19176-0173. If the policy number is unknown, provide the veteran's social security number and date of birth/death. If retiree was insured, they will provide the application for benefits to you. Fill out the application and return along with a copy of the retiree's death certificate.

h. Veterans Administration Insurance. Insurance contracted through the Veterans Administration Insurance Center (disabled retirees). To report death or check if a retiree was insured, call (800) 669-8477, or write to Department of Veterans Affairs, Regional Office and Insurance Center for your area. If the policy number is unknown, provide the veteran's file number, social security number, date of birth, military serial number or military service branch and dates of service. If retiree was insured, they will provide the application for benefits to you. Fill out the application and return along with a copy of the retiree's death certificate. Veterans Affairs Regional offices are listed below:

Indiana	Department of Veterans Affairs Regional Office and Insurance Center 575 North Pennsylvania Street Indianapolis, IN 46204
Kentucky:	Department of Veterans Affairs Regional Office and Insurance Center 545 South Third Street Louisville, KY 40202
Michigan	Department of Veterans Affairs Regional Office and Insurance Center 2500 South Washington Avenue Lansing, MI 48913
Ohio	Department of Veterans Affairs Regional Office and Insurance Center 1240 North 9 th Street Cleveland, OH 44199
West Virginia	Department of Veterans Affairs Regional Office and Insurance Center

210 Franklin Road SW
Roanoke, VA 24011

Section XIV. FINANCIAL AND LEGAL ASSISTANCE.

a. Financial Assistance. Survivors may contact the Army Emergency Relief (AER) if they need assistance for a financial emergency. Contact the Army Emergency Relief office servicing your area.

Indiana Contact Fort Knox, Kentucky

Kentucky Commander, Fort Knox
1477 Eisenhower Avenue
Fort Knox, KY 40121
Phone: (502) 624-5989

Michigan Commander, United States Army Garrison – Selfridge
6501 E. 11 Mile Road Bldg 232
Selfridge ANG Base, MI 48045
Phone: (586) 282-0480/0489

Ohio Contact Fort Knox, Kentucky

West Virginia Contact Fort Knox, Kentucky

b. Legal Assistance. Contact the Fort Knox Legal Assistance Office, (502) 624-2771.

Section XV. FORMS

Veterans Administration Forms. May be obtained online at:
<https://www.va.gov/vaforms/default.asp>.

a. DD Form 2656-7, Verification for Survivor Annuity. This form is used by eligible beneficiaries (widowed spouses, dependent children, surviving former spouses, and natural interest persons) to apply for an annuity.

b. SF 180, Request Pertaining to Military Records. This form is used to request information from records of military personnel, e.g., DD Form 214, Certificate of Release or Discharge from Active Duty or equivalent. For a copy of SF 180, Request Pertaining to Military Records, go to <https://www.archives.gov/files/research/order/standard-form-180.pdf>, contact your nearest military installation or call one of the National Personnel Records Center information lines:

Air Force (314) 538-4243

Army (314) 538-4261
Navy/Marine Corps/Coast Guard (314) 538-4141

The caller will receive a tape-recorded statement and be able to leave a message with their name and address. The center will mail the forms necessary to submit the request.

c. Standard Form 1174, Claim for Unpaid Compensation of Deceased Member of the Uniformed Services. This form is used to apply for Unpaid Pay and Allowances (UPPA). In order to receive the UPPA, complete the claim application; have your signature witnessed by two persons. The form may be obtained online at: <https://www.dfas.mil/retiredmilitary/forms/sf1174annuityaop.html>.

d. SGLV 8283, Claim for Death Benefits. This form is used to apply for payment of death benefits under Servicemembers' and Veterans' Group Life Insurance. May be obtained online at: <https://www.benefits.va.gov/insurance/forms/8283.htm>.

e. Standard Form 1199, Direct Deposit sign up Form. This form is used for processing annuity payments directly to your financial institution. The Department of Defense requires mandatory direct deposit of annuity check to a financial institution. The FastStart Form must be completed and returned with your annuity application. May be obtained online at: <https://www.dfas.mil/retiredmilitary/forms.html>.

f. Department of the Treasury Internal Revenue Service Form W-4P, Withholding Certificate for Pension or Annuity Payments. This form is for recipients of income from annuity, pension, and certain other deferred compensation plans to tell payers whether income tax is to be withheld and on what basis. Federal income tax is withheld from your annuity based on your tax status (married, single, or exempt) and the number of withholding allowances claimed on a W-4P. Please complete the W-4P and return it with your annuity application. May be obtained online at: <https://www.irs.gov/uac/about-form-w4p>.

Section XVI. DIRECTORY OF FREQUENTLY CALLED TELEPHONE NUMBERS.

The telephone numbers listed below will be helpful in the settlement of personal affairs. The list may not be a complete telephone number to every agency; however, the list does include the most frequently contacted agencies.

Fort Knox Casualty Assistance Center (Bldg.1378) (502) 624-6051/3107/7846/4318
Armed Forces Benefit Association..... (800) 776-2322
Army Emergency Relief (Fort Knox)(502) 624-5989
Army and Air Force Mutual Aid Association..... (800) 522-5221

American Red Cross (Louisville Chapter)	(502) 589-4450
Chaplain (Fort Knox)	(502) 624-5255
Civilian Personnel Advisory Center (CPAC).....	(502) 624-4839
Legal Assistance.....	(502) 624-2771
Military Benefit Association.....	(800) 336-0100
Office of Personnel Management (Federal Retirees)	(888) 767-6738
Officers Benefit Association.....	(800) 633-4632
Public Affairs Office.....	(502) 624-3051
Retired Pay Operations (DFAS-Cleveland)	(800) 321-1080
Retirement Services Officer (Fort Knox)	(502) 624-6419
Servicemen's and Veterans Group Life Insurance.....	(800) 419-1473
Social Security Administration.....	(800) 772-1213
Tricare Advisor (Tricare East)	(800) 444-5445
Uniformed Benefit Association.....	(800) 368-7021
Veterans Affairs.....	(800) 827-1000
VA Headstones and Markers.....	(800) 697-6947