



U.S. ARMY OKINAWA

★ TORII STATION ★



LEGAL ASSISTANCE

• 652-4332 / 4742 • BUILDING 218, ROOM 220 •

CHECKLIST FOR OVERSEAS RETIREES

1. Are you married?

Yes

No

2. Are you married to a US Citizen?

Yes

No

3. Does your spouse have a Social Security Number?

Yes _____

No

4. Does your spouse have an Individual Taxpayer Identification Number (ITIN)?

Yes _____

No

5. Do you file a joint tax return with your spouse?

Yes

No

6. Are you a resident (Not SOFA) of Japan?

Yes

No

7. Are you a permanent resident of Japan?

Yes

No

8. Do you have residence in any U.S. State? (What State?)

Yes _____

No

9. Do you have a stateside driver's license? (What State?)

Yes _____

No

10. Are you registered to vote? (What State?)

Yes _____

No

11. Do you own real property in the United States? (What State?)

Yes _____

No

12. Do you want your spouse to have all of your money in your bank and credit union accounts?

Yes

No

12a. If yes, is your spouse listed as a joint owner or paid on death beneficiary?

Yes

No

13. Do you own stock or have a brokerage account?

Yes

No

13a. If yes, is your spouse listed as a joint owner or paid on death beneficiary?

Yes

No

14. Do you have a life insurance policy/policies?

Yes

No

14a. If yes, is the named beneficiary current?

Yes

No

15. Do you have a Will? (What State?)

Yes _____

No

16. Is your Will Current?

Yes

No

17. Do you have a Living Will?

Yes

No

18. Do you have a Healthcare Power of Attorney?

Yes

No

19. Do you have or want a Power of Attorney? (General or Special)

Yes

No