

**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 \_\_\_\_\_

Spouse's Maiden Name \_\_\_\_\_ DOB \_\_\_\_\_

Place of Birth \_\_\_\_\_

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 (CHAMPUS, 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 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 ownerships

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 877-353-6807 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) 800-321-1080 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.