

FAMILY ASSISTANCE PROGRAM
Planning Documents Checklist

For used by Military Veterans, their Spouses or Family Members

This checklist is designed to better equip you and your loved ones with the knowledge, documentation 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 addressed in advance by members and their families.

_____ Download and complete, "*MAKING THINGS EASY FOR MY FAMILY.*" The PDF file on the SMART website can be copied and pasted into a word type program for easier completion. The information can cover one or both spouses, both are recommended It will help start to organize your information and put it into a format that anyone can use and understand. It creates some of the below listed files.

_____ *Create a military document file* and file it in a secure location such as a fireproof safe, or fireproof folders. A safety deposit box is also good, but you must insure someone can gain access to it easily in the event of loss. In this file, include military retirement orders, separation papers DD Forms 214, Certificate of Discharge or Separation, medical records, a recent retired pay statement and other important military document. Retired pay statements should be replaced whenever your pay changes.

NOTE: Make sure that the 214s cover the entire period of the veteran's military service career. Where service was in different military branches or components, there was a break in service, mixed enlisted and commissioned time, there will be a number of DD 214's which added together will equal their entire period of service. If sufficient original documents are not available, have a Notary Public make copies of original documents and certify them as true & accurate copies. To request free copies online for each term of service go to <https://vetrecs.archives.gov/VeteranRequest/home.html#RequesterInformation> and complete the application. You must order the DD 214(s) for each term of enlistment separately. Every living veteran should have the copies they or their family needs now, DON'T WAIT! It could take 3 weeks or more to get copies at no charge.

_____ *Create a personal document file.* It will have copies of adoption papers, birth certificates, divorce or annulment decrees, death certificates, marriage certificates, naturalization papers, passports, or passport numbers. Have at least one (1) original or certified copy available, two (2) is better. These can be obtained online at the county Register of Deeds offices, the State Vital Records Department, or through www.vitalchek.com. Divorce and annulment decrees can also be obtained through the County Clerk of Court where the action occurred. Again, DON'T WAIT, it will take 2 to 4 weeks to obtain certified copies.

_____ *Create a Legal Documents File.* In it have a will(s) with any applicable codicils (amendments), living will(s), durable power of attorney, or family trust. Family trusts are a valuable legal instrument that avoids probate court. This mitigates actions or judgments the

probate court may make. If you need legal assistance, contact an attorney, or view the following Web Site: www.legalassistance.law.af.mil/locator.php to locate a legal assistance office in your area.

_____ *Create a Casualty Assistance Office (CAO) contact Information file.* It can be for the particular branch of the service or the CAO at the nearest military installation This can be found in the military retiree newsletters and publications “Army Echo, US Army; “Semper Fidelis”, USMC; “Shift Colors”, US Navy; “After Burner”, US Air Force; “Semper Paratus”, US Coastguard and NOAA. Keep 2 or 3 of the most recent issues for reference.

_____ *Create a Veteran’s Administration (VA) file.* This file should also include the VA Claim number if any disability or claim has been awarded or is pending. Also include address of the VA office being used. Make a list of deductions currently being made from benefits; and the name, relationship and address of the person that is named as the beneficiary of any unpaid benefits at the time of death and possibly Dependency and Indemnity Compensation (DIC). DIC could be paid to the spouse of a veteran should it be proven the member’s death was service connected or if the member was receiving a 100% service-connected disability pension from the VA for a period of 10 years, regardless of the cause of death.

_____ *Create an annuities file.* This file should have information about the Survivor Benefit Plan (SBP), Reserve Component Survivor Benefit Plan (RCSBP), the Retired Serviceman’s Family Protection Plan (RSFPP), Civil Service annuity, or civilian employment retirement/survivor benefit plan. Information regarding SBP annuity claims may be obtained from the local Veteran’s Services Office (VSO) or Casualty Assistance Office (CAO) at the nearest military facility. It should also contain annuity policies from commercial insurance companies.

_____ *Create an income tax file.* Include copies of your state and federal income tax returns. Check with your tax preparer for the number of years needed or IRS.gov. If you use a particular tax preparer, list them with a phone number.

_____ *Create a personal property file.* Include copies of property tax statements, deeds, vehicle titles and any other related information. If applicable, all titles should reflect joint ownership.

_____ *Create an insurance policy file.* Include life, accident, homeowners, long term care and specialty (i.e., cancer, mortgage, etc.) insurance policies. Check all policies to ensure the beneficiaries are correct and up to date. Some insurance policies may have restricted death benefits. Examples: An auto policy having a accidental death clause where an individual’s death occurs in any form of transportation or in a cancer policy where the decedent dies of cancer. Check these out and list them.

_____ *Create a financial file.* Include a list of all bank accounts and credit unions (joint or individual). The location of all safe deposit boxes, savings bonds, stocks, bonds and any securities owned. Include a list of all charge accounts and credit cards to include account numbers and mailing addresses. Keep this list current when changes or replacement cards are issued.

_____ Create a list of all associations and organizations of which you are a member. Some of them could provide assistance in time of need. Organizations may include the VFW, American Legion, Am Vets, DAV, Fleet Reserve, Lions, Elks and Kiwanis

._____ Maintain a list of all friends and business associates who may be helpful. Include name, address, and phone numbers. Keep list current including mobile phone numbers and email addresses.

_____ Spend time with your spouse and/or family members. Discuss plans with respect to final arrangement to include funeral or memorial service, cemetery, type of burial. If your family knows your desires, it will solve many problems that might occur later.

_____ Visit a local funeral home or crematoriums and pre-arrange your services. Many organizations, such as the VFW and American Legion have an excellent military honors programs. Many states will allow you to pre-pay for services saving the estate valuable assets. Inquire about a Memorial or Cremation Society. See Appendix for more information.

_____ 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. Information regarding Burials at Sea may be obtained by contacting the Office of Medical and Dental Affairs-Mortuary Affairs Division at 888-647-6676, option 4.

._____ If an Organ Donor make necessary arrangements to allow donation of organs. Consult with your doctor/physician on this matter. Also arrange for entry on your driving license and inclusion in your Will or Trust. If decision is made to donate your body for medical research purposes, contact nearby medical school to set up donation procedures. See Appendix for more information.

DISCLAIMER: The information provided is for and by SMART members for the intended and sole use by SMART members, family members and qualified past members of SMART. This is provided as a Service and at no charge or obligation. This document or the guidance provided in conjunction with it should not be construed as a Legal Service but a Member Service. SMART or any of our officers and members are not responsible for the accuracy of the information. Any comments, corrections or recommendations should be forwarded to SMART Headquarters and will be deeply appreciated and responded to.

Appendix I

ORGAN OR BODY DONATION PROCESS To allow organ donation, contact your Drivers License office to ensure that this permission is included in your license; this will allow for rapid donation of your organs in the event of accidental automotive death. Further, include this wish in your Letter of Preferences, in order to ease a decision by your spouse (or designated family member). To allow body donation for medical research, contact a nearby medical school (if available) to find out if they have a Donation Program. If there is a Medical School (i.e., Emory Medical School or equivalent) within local area, contact their Body Donation Program Office.

They will provide instructions and details on the body and subsequent burial, cremation or return to the family.

Appendix II

MEMORIAL AND CREMATION SOCIETIES There are Memorial and Cremation Societies in many areas. These societies usually have arrangements with Funeral Homes in their area, and can qualify for discounts in cremation and funeral arrangements. Some of these societies can refer you to societies in other areas, if necessary (death in another state, for instance)

Websites and phone numbers of special interest

SBP - <https://militarypay.defense.gov/benefits/survivor-benefit-program/>

Military/Dependent ID Card locations/appointments: <https://idco.dmdc.osd.mil/idco/>

Reporting a Death—Army, Navy, USMC, USAF. Defense Finance and Accounting Service - DFAS.com or 1-800-321-1080. For the USCG call 1 866 772-8724

Army Casualty services: <https://www.hrc.army.mil/content/reporting%20a%20death> or 800-626-3317

USAF: <https://www.afpc.af.mil/Airman-and-Family/Casualty-Operations/>, CAO Locator 877-

353-6807 Navy: <https://www.mynavyhr.navy.mil/Media-Center/Publications/Shift-Colors/How-to-Report-a-Retirees-Death/> NPC Customer Service Center at 866-827-5672 Ext 4308.

USMC: 800-847-1597.

https://www.manpower.usmc.mil/webcenter/portal/MF_MPS_CA/pages_casualtyassistancecommandrepresentative

USCG: <https://www.dcms.uscg.mil/portals/10/cg-1/ppc/ras/survivorguide.pdf>

Veterans Administration programs and benefit information: www.va.gov