

Survivor Checklist

This checklist has been prepared to help survivors address a variety of concerns involved in caring for the affairs of a deceased individual. It is not all inclusive, and is not intended to replace legal counsel where services of an attorney may be suitable or necessary.

/ Casualty Assistance Calls Officer for Active Duty Deaths

Survivors of a military member who dies on active duty will be assigned a Casualty Assistance Calls Officer (CACO) to be their liaison with the service. The CACO is there to help survivors coordinate funeral arrangements and apply for benefits and entitlements. The CACO is not a subject matter expert, but is trained to answer general questions and to refer survivors to the appropriate expert or agency to assist them.

Obtain

- Several original copies of the death certificate (often provided by the funeral director); there may be a fee

Review

- Survivor's life insurance and other policies; revise as appropriate

Notify

Accounts held by the deceased:

- Financial
- Investment/TSP/401(k)
- Credit/Recurring payments

Insurance companies:

- Life
- Auto
- Health
- Home

- Internal Revenue Service (IRS) for potential forgiveness of decedent's tax liability
- Department of Motor Vehicles (DMV)
- Social, fraternal, academic, or religious organizations

Update

- Survivor's will, medical power of attorney, durable power of attorney, and/or living will as necessary

Renew

- Military identification card

Contact

- Defense Enrollment Eligibility Reporting System (DEERS)
- Department of Veterans Affairs (VA)
- TRICARE
- Employer of the deceased
- Social Security Administration (SSA)
- Defense Finance Accounting Service (DFAS)
- U.S. Coast Guard Pay and Personnel Center (PPC)

Veteran and Survivor Services

Upon separation or retirement, a veteran's survivors are no longer provided a CACO to assist in navigating government benefits. Navy Mutual provides veterans services free of charge to veterans and their survivors.

Navy Mutual's accredited VSO representatives can assist survivors with applications for survivor benefits and programs offered through the Veterans Benefits Administration (VBA) and National Cemetery Administration (NCA), including pre-need eligibility, Dependency and Indemnity Compensation (DIC), survivors' pension, and burial benefits.

Additionally, Navy Mutual's VSO representatives may assist veterans with submitting disability compensation claims to the VBA or appeals to the Board of Veterans' Appeals (BVA).

Contact Navy Mutual's Veterans Services team for more details: education@navymutual.org or 888-298-4442.

Quick Reference List



Air Force Aid Society (AFAS)

703-972-2650
www.afas.org

American Red Cross

800-733-2767
www.redcross.org

Arlington National Cemetery

877-907-8585
www.arlingtoncemetery.mil/funerals

Army Emergency Relief Services (AERS)

866-878-6378
<https://www.armyemergencyrelief.org/>

Coast Guard Mutual Assistance

800-881-2462
www.cgmahq.org

Defense Enrollments Eligibility Reporting System (DEERS)

800-538-9552
www.dmdc.osd.mil

Defense Finance and Accounting Service (DFAS)

888-332-7411
www.dfas.mil

Internal Revenue Service

800-829-1040
www.irs.gov
For potential forgiveness of decedent's tax liability, see IRS Publication 3, *Armed Forces' Tax Guide*

National Cemetery Administration (NCA)

800-698-2411
www.cem.va.gov

National Personnel Records Center

866-272-6272
www.archives.gov/personnel-records-center

Navy Gold Star

888-509-8759
www.navygoldstar.com

Navy-Marine Corps Relief Society (NMCRS)

800-654-8364
www.nmcrcs.org

Office of Servicemembers' Group Life Insurance (OSGLI) - SGLI / VGLI

800-419-1473
<https://www.benefits.va.gov/INSURANCE/sglivgli.asp>

Social Security Administration (SSA)

800-772-1213
www.ssa.gov

Survivor Outreach Services (Army)

210-466-1173
bit.ly/army-sos

Tragedy Assistance Program for Survivors, Inc. (TAPS)

800-959-8277
www.taps.org

TRICARE

East: 800-444-5445
West: 844-866-9378
www.tricare.mil

U.S. Coast Guard Pay and Personnel Center (PPC)

866-772-8724
www.uscg.mil/ppc

Veterans Benefits Administration (VBA)

800-827-1000
www.va.gov

For any additional information:

Navy Mutual
888-298-4442