



PLANNING CHECKLIST

Making sure your family is knowledgeable about a variety of personal financial and family issues is important. Experts recommend preparing some type of a personal log to document this information. There are a number of steps that can be taken in advance to help the transition go smoother for family members grieving the loss of a loved one.

INITIAL STEPS

- Does each spouse/beneficiary have a general understanding of the family's assets and investments? This includes knowing where the money is and why it is there.
- Does each spouse/beneficiary know where all important documents are: financial statements, insurance policies, deeds, wills and trust?
- Does each spouse/beneficiary have website login information and know who to contact when needed?
- Does each spouse/beneficiary have a will, an advance medical directive and a durable power of attorney? Military Legal Assistance can assist active duty, retirees, and their families with this. Does each spouse know the other's wishes regarding life support and quality of life issues?
- Does each spouse/beneficiary know where records of previous and current year IRS materials are kept?
- Are medical and dental records up to date? Does each spouse/beneficiary know where those records are kept or how to access them?

IMPORTANT DOCUMENTS

Keep one hard copy or digital folder with original/copies of important documents in a safe storage location, preferably outside the home. Keep another folder with copies of these documents in an easily accessible and secure location.

- Marriage, Birth, and Death Certificates
- Wills and Trust
- Financial Records and Insurance Beneficiaries
- Advance Medical Directives and Powers of Attorney
- Summary of VA Benefits
- DD Form 214
- Social Security Administration Summary of Benefits
- Divorce Decrees
- Adoption Papers
- Naturalization Papers
- Vehicle Title and Registration Papers
- Leave and Earnings Statement (LES) or Retiree Account Statement (RAS)
- Medical Treatment Records

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

www.aerhq.org

Defense Enrollment Eligibility Reporting System (DEERS)

800-538-9552

www.dmdc.osd.mil

Defense Finance & Accounting Service (DFAS)

800-321-1080

www.dfas.mil

Department of Veterans Affairs (VA)

800-827-1000

www.va.gov

Internal Revenue Service (IRS)

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)

For burial benefits: 866-900-6417

www.cem.va.gov

National Personnel Records Center

866-272-6272

www.archives.gov

Navy Gold Star

888-509-8759

www.navygoldstar.com

Navy-Marine Corps Relief Society (NMCRS)

800-654-8364

www.nmcrs.org

Navy Wounded Warrior Safe Harbor

855-628-9997

www.navywoundedwarrior.com

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

800-419-1473

www.benefits.va.gov/insurance/sgli.asp

Social Security Administration (SSA)

800-772-1213

www.ssa.gov

Survivor Outreach Services

855-707-2769

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 & Personnel Center (PPC)

800-772-8724

www.uscg.mil/ppc

For any additional information:

Navy Mutual

800-628-6011

www.navymutual.org

