

# Survivor Checklist

This checklist has been prepared to help survivors address a variety of concerns involved in caring for the affairs of a deceased person. 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

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 (funeral director will usually provide). Note that there may be a fee.

### Review

- ☐ Survivor's life insurance policy(ies) as well as other policies; revise as appropriate

### Notify

Accounts held by the deceased:

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

Insurance companies:

- ☐ Life ☐ Auto ☐ Health

- ☐ 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 veteran services free of charge to all Navy Mutual Members and their survivors.

Navy Mutual's accredited VSO Representatives can assist Members and their beneficiaries 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 Members 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: [vso@navymutual.org](mailto:vso@navymutual.org) or 888-298-4442.

# Quick Reference List



## **Air Force Aid Society (AFAS)**

703-972-2650

[www.afas.org](http://www.afas.org)

## **American Red Cross**

800-733-2767

[www.redcross.org](http://www.redcross.org)

## **Arlington National Cemetery**

877-907-8585

[www.arlingtoncemetery.mil/funerals](http://www.arlingtoncemetery.mil/funerals)

## **Army Emergency Relief Services (AERS)**

866-878-6378

[www.aerhq.org](http://www.aerhq.org)

## **Coast Guard Mutual Assistance**

800-881-2462

[www.cgmahq.org](http://www.cgmahq.org)

## **Defense Enrollments Eligibility Reporting System (DEERS)**

800-538-9552

[www.dmdc.osd.mil](http://www.dmdc.osd.mil)

## **Defense Finance and Accounting Service (DFAS)**

800-321-1080

[www.dfas.mil](http://www.dfas.mil)

## **Internal Revenue Service**

800-829-1040

[www.irs.gov](http://www.irs.gov)

For potential forgiveness of decedent's tax liability, see IRS Publication 3, *Armed Forces' Tax Guide*

## **National Cemetery Administration (NCA)**

866-900-6417

[www.cem.va.gov](http://www.cem.va.gov)

## **National Personnel Records Center**

866-272-6272

[www.archives.gov/personnel-records-center](http://www.archives.gov/personnel-records-center)

## **Navy Gold Star**

888-509-8759

[www.navygoldstar.com](http://www.navygoldstar.com)

## **Navy-Marine Corps Relief Society (NMCRS)**

800-654-8364

[www.nmcrcs.org](http://www.nmcrcs.org)

## **Navy Wounded Warrior Safe Harbor**

855-628-9997

[www.navywoundedwarrior.com](http://www.navywoundedwarrior.com)

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

800-419-1473

[www.benefits.va.gov/insurance/sgli.asp](http://www.benefits.va.gov/insurance/sgli.asp)

## **Social Security Administration (SSA)**

800-772-1213

[www.ssa.gov](http://www.ssa.gov)

## **Survivor Outreach Services**

855-707-2769

[bit.ly/army-sos](http://bit.ly/army-sos)

## **Tragedy Assistance Program for Survivors, Inc. (TAPS)**

800-959-8277

[www.taps.org](http://www.taps.org)

## **TRICARE**

East: 800-444-5445

West: 844-866-9378

[www.tricare.mil](http://www.tricare.mil)

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

800-772-8724

[www.uscg.mil/ppc](http://www.uscg.mil/ppc)

## **Veterans Benefits Administration (VBA)**

800-827-1000

[www.va.gov](http://www.va.gov)

## **For any additional information:**

Navy Mutual

888-298-4442