

PLANNING CHECKLIST

CHECKLIST PROVIDED BY NAVY MUTUAL AID ASSOCIATION

1-800-628-6011

www.navymutual.org

Making sure that the member's 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 for the loss of a loved one. Following is a checklist to assist this preparation.

- Does each spouse 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 know where all important papers are: bank account statements; investments; deeds and insurance policies (life, medical, property/casualty, long term care)? This may include website login information and who to contact when needed.
- Does each spouse have a will? (Military Legal Assistance can assist with this.) Along with a will, does each spouse know the other's wishes? Life support and quality of life issues are among the things to discuss and put in writing. It may be beneficial to consider a living will, an advance medical directive and a durable power of attorney.
- Keep one folder with original copies of the following forms, and any others that are important to you. Locate a safe storage location for these and other important originals, preferably outside the home:
 - Marriage and Birth Certificate
 - Wills
 - Trust
 - Advance Medical Directives
 - Powers of Attorney
 - DD Form 214
 - Social Security Papers
 - Divorce Decrees
 - Adoption papers
 - Naturalization Papers
 - Vehicle Title and Registration Papers
- Keep another folder with copies of these forms in an easily accessible and secure location.
- Does each spouse have access to current names, addresses, and contact information for:
 - Family Members
 - Close Friends
 - Attorney
 - Financial Planner
 - CPA
 - Place of worship
 - Funeral, burial and church service details
- Does each spouse know where records of previous years IRS returns and also current year materials are kept?
- Are medical and dental records up to date? Does each spouse know where all records are kept, including pet records?



>>> Department of Veterans Affairs (VA)

Benefits (800) 827-1000
 Life Insurance (800) 669-8477
Website: www.va.gov

>>> Social Security

(800) 772-1213
Website: www.socialsecurity.gov

>>> Defense Finance & Accounting Service (DFAS)

Retired and Annuity Pay
 (800) 321-1080
Website: www.dod.mil/dfas

>>> US Coast Guard Headquarters

Decedent Affairs
 Active Duty (866) 772-8724
 Retired (800) 772-8724
Website: www.uscg.mil/hq/g-w/g-wp/g-wpm/g-wmp-2/Decedent.htm

>>> National Oceanic and Atmospheric Administration (NOAA)

Commissioned Personnel Center (800) 224-6622
Website: www.noaacorps.noaa.gov

>>> US Public Health Services (USPHS)

Survivor Assistance (800) 638-8744
Website: www.usphs.gov

>>> Navy Military Personnel Command, Casualty Assistance Branch

Active Duty/Reserves (800) 368-3202
 Retired (800) 321-1080
Website: www.npc.navy.mil/commandsupport/casualtyassistance/

>>> Headquarters, US Marine Corps

Casualty Assistance (800) 847-1597
Website: www.marines.mil

>>> Military Officers Association of America (MOAA)

Survivor Assistance (800) 245-8762
Website: www.moaa.org

>>> Office of Service Member's Group Life Insurance (OSGLI) – SGLI/VGLI

(800) 419-1473
 Report a Death (800) 669-8477
Website: www.insurance.va.gov/sgliSite/default.ntm

>>> Tragedy Assistance Program for Survivors, Inc. (TAPS)

(800) 959-TAPS (8277)
Website: www.taps.org

>>> Navy-Marine Corps Relief Society (NMCRS)

(703) 696-4904 or (800) 654-8364
Website: www.nmcrs.org

>>> Arlington National Cemetery

(703) 607-8585
 (800) 535-1117

>>> Tricare

North (877) 874-2273
 South (800) 444-5445
 West (888) 874-9378
 Overseas (888) 777-8343
 For Life (866) 773-0404
Website: www.tricare.mil

>>> DEERS Eligibility

(800) 538-9552

>>> Additional Information on Survivor Benefits can be found at

- www.navymutual.org
- www.lifelines.navy.mil
- www.va.gov
- www.dod.mil/dfas
- www.afpc.randolph.af.mil

>>> Additional Reserve Specific Information

- <http://arpc.afrc.af.mil/entitlements/rcsbp.asp#0>
- www.afpc.randolph.af.mil http://arpc.afrc.af.mil/tools/rcsbp_calculator/default.asp

