

# SURVIVOR'S ASSISTANCE CHECKLIST

There are numerous tasks to be completed following the death of a retiree. This checklist is designed to assist your surviving family members in taking the necessary actions in the event of your demise.

## Immediate Actions

1. Notify the Defense Finance and Accounting Service-Cleveland Center (DFAS-CL) of the retiree's passing. DFAS-CL will stop the member's retired pay and provide the required information regarding the Retired Service members' Family Protection Plan (RSFPP) or the Survivor Benefit Plan (SBP) if the member was enrolled in either program.

Call DFAS-CL: (800) 321-1080  
Date completed: \_\_\_\_\_

2. Contact your nearest Navy Retired Activities Office (RAO) for assistance if there is one nearby. Alternatively, use an Army Retirement Services Office (RSO) or an Air Force Retiree Activities Office (RAO).

Check a recent edition of Shift Colors or call (866) 827-5672 for a listing of Navy RAO telephone numbers.  
Date completed: \_\_\_\_\_

3. Contact the Department of Veterans Affairs (VA) to obtain:

- a. Flag for burial (frequently funeral directors will assist in this matter);
- b. Burial assistance (if member died of a service-connected disability or in VA hospital);
- c. Dependency and Indemnity Compensation (DIC) (if the cause of the retiree's death was service connected).

**Note:** You will need a copy of the service member's discharge document(s) to include the DD Form 214, retirement certificate/orders to apply for any VA benefits.

VA Regional Office: 800) 827-1000  
Date completed: \_\_\_\_\_

4. Contact the Social Security Administration (SSA) to apply for the \$255 burial payment paid only to spouses, not adult children. (Note: You will need to schedule an appointment with the local SSA office to review eligibility for additional benefits.)

SSA: (800) 772-1213  
Date completed: \_\_\_\_\_

5. If covered under Veterans' Group Life Insurance (VGLI), report the death to the Office of Service member's Group Life Insurance (OSGLI). If covered by VA National Service Life Insurance (NSLI) call (800) 669-8477

VGLI Office: (800) 419-1473  
Date completed: \_\_\_\_\_

## Follow-up Actions (to be completed within 6 months):

1. Obtain a new dependents identification card (ID) (will change/update DEERS) from the nearest military installation. Questions concerning ID cards should be directed to the Navy Personnel Command, Benefits/Identification Eligibility Branch, PERS-312, at (866) 827-5672.

Date completed: \_\_\_\_\_

2. If enrolled in RSFPP or SBP and not yet receiving an annuity, contact Defense Finance and Accounting Service-Cleveland Center.

DFAS-CL: (800)321-1080  
Date completed: \_\_\_\_\_

3. When necessary, call DFAS-CL for member's 1099R (for tax purposes) and call DFAS-CL for SBP annuitant's 1099R.

DFAS-CL: (800) 321-1080  
Date completed: \_\_\_\_\_



**Members of a Navy Honor Guard prepare to fold an American Flag prior to its presentation to family members during a burial ceremony at NAS Oceana, CA.**

# SURVIVOR'S ASSISTANCE CHECKLIST

Recommendation: Your spouse or surviving family member should be aware of where and how to locate original documents. It should be completed NOW. Don't put off doing it.

## Personal Information

	Retiree	Spouse
Name:		
Street and Number		
City, State, Zip+4:		
Date of Birth:		
Place of Birth:		
Social Security Number:		
Date/Place of Marriage:		
Driver's License Number:		
State Issued by:		
Father's Name:		
Date of Birth:		
Place of Birth:		
Mother's Maiden Name:		
Date of Birth:		
Place of Birth:		
Location of Birth/ Marriage/Divorce Documents:		

## Military Information

Name:	
Branch of Service:	
Service/File Number:	
Date Entered:	
Place:	
Date of Retirement:	
Retired Rank/Rating:	
Location of Current Retiree Account Statement (RAS):	
Enrolled in: RSFPP SBP RCSBP (Circle all that apply)	
Can be verified by checking retiree's Retiree Account Statement (RAS) from DFAS.	
<u>Wars And Conflicts Served:</u>	

Awards/Decorations:

DD Form 214:

Locations of Documents:



# SURVIVOR'S ASSISTANCE CHECKLIST

## Social Security Information

Receiving Social Security Benefits:

Health Insurance: Medicare Part A. - Medicare Part B.

Medicare Part D: YES NO - TRICARE for Life: YES NO

Other \_\_\_\_\_

Location of Documents: \_\_\_\_\_

## Veterans Affairs Information

VA Universal Access Identification Card: \_\_\_\_\_

Document Location: \_\_\_\_\_

## Insurance Information

National Service Life Insurance (NSLI), Service Group Life Insurance (SGLI), Veterans Group Life Insurance (VGLI) (Circle the appropriate coverage), Other \_\_\_\_\_

Name:	Policy Number:
Name:	Policy Number:
Name:	Policy Number:
Name:	Policy Number:

Locations of Policies: \_\_\_\_\_

## Investment and Banking Information

Bank/Financial Institution: \_\_\_\_\_

Bank/Financial Institution: \_\_\_\_\_

Bank/Financial Institution: \_\_\_\_\_

Bank/Financial Institution: \_\_\_\_\_

Location of Documents: \_\_\_\_\_

Safety Deposit Box Number(s): \_\_\_\_\_

Box(s) Location (Bank): \_\_\_\_\_

Number of Key(s): \_\_\_\_\_

Locations of Key(s): \_\_\_\_\_

## Individual Retirement and/or Annuity Accounts

Bank/Financial Institution: \_\_\_\_\_

Bank/Financial Institution: \_\_\_\_\_

Bank/Financial Institution: \_\_\_\_\_

Bank/Financial Institution: \_\_\_\_\_



# SURVIVOR'S ASSISTANCE CHECKLIST

## Certificates of Deposit

Bank/Financial Institution: \_\_\_\_\_

Bank/Financial Institution: \_\_\_\_\_

Bank/Financial Institution: \_\_\_\_\_

Bank/Financial Institution: \_\_\_\_\_

## Medical And Dental Records

Physician's Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City, State, Zip+4: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Physician's Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City, State, Zip+4: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Physician's Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City, State, Zip+4: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Dentist Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City, State, Zip+4: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Living Will: \_\_\_\_\_

Location: \_\_\_\_\_

## Miscellaneous Information

Trust: \_\_\_\_\_

Will: \_\_\_\_\_

Real Estate Deeds: \_\_\_\_\_

Income Tax: \_\_\_\_\_

Vehicle Registrations: \_\_\_\_\_

Vehicle Titles: \_\_\_\_\_

Credit Cards Numbers: \_\_\_\_\_

Location of Documents: \_\_\_\_\_



# SURVIVOR'S ASSISTANCE CHECKLIST

It is recommended that you review your electronic information and ensure that heirs or successor trustees have information to access and/or close out any accounts that are no longer needed. Examples: email, social networks, Amazon accounts, etc.

Names and Organizations that should be notified upon death of retiree.  
Include Name, Address, Telephone Numbers:

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*Use additional sheet to list more Name/Address/Telephone Numbers*

## Internment Information

Cremation or Burial (Circle One):	National Cemetery	Private Cemetery	Burial at Sea
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Funeral Home: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City, State, Zip+4: \_\_\_\_\_

Type of property (Circle One):	Mausoleum	Ground Burial	Crypt	Urn/Niche
Service location (Circle One):	Church	Funeral Home	Gravesite	None
Military funeral (Circle One):	YES	NO		

Church Address: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_  
Clergyman's Name: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_  
Casket: \_\_\_\_\_  
Obituary: \_\_\_\_\_  
Music Selection: \_\_\_\_\_

Clothing (Circle One):	Civilian	Uniform
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Jewelry: \_\_\_\_\_

Glasses on (Circle One):	YES	NO
Visitation prior to service (Circle One):	YES	NO
Casket open for viewing (Circle One):	YES	NO

Other Instructions: \_\_\_\_\_

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## Help Numbers

A listing of Retired Activities Offices (RAOs) with contact information can be found on page 22 of this issue.

Activity	Telephone Number
Burial Benefits Information, call: Veterans Affairs Social Security	(800) 827-1000 (800) 772-1213
Death Notification call Defense Finance Accounting Service (DFAS Casualty) Indianapolis, IN	(800) 321-1080 (24 hours)
Death Notification Insurance, call: National Service Life Insurance (NSLI) Service Group Life Insurance (SGLI) United States Government Life Insurance (USGLI) or (OSGLI) Veterans Group Life Insurance (VGLI)	(800) 669-8477 (800) 419-1473 (800) 669-8477  (800) 419-1473
Death Notification Social Security	(800) 772-1213

### Necessary Documents (when completing forms DFAS sends AFTER notification of death)

1. Copies of Form DD214, or Retirement Orders, or 20-Year Letter
2. Copies of Marriage License
3. Certified copies of death certificate



**ATLANTIC OCEAN (Feb. 7, 2023) Sailors watch the sunset aboard the Nimitz-class aircraft carrier USS Dwight D. Eisenhower (CVN 69) after an ammunition onload with the dry cargo and ammunition ship USNS Medgar Evers (T-AKE 13).**

Photo by Mass Communication Specialist 2nd Class Asheka Lawrence-Reid