

## Retiree Casualty Assistance Checklist

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As-of date \_\_\_\_\_

Retiree's Name \_\_\_\_\_

SSN \_\_\_\_\_

Military Grade/Rank \_\_\_\_\_ Date of Retirement \_\_\_\_\_

Branch of Service \_\_\_\_\_ Years of Service \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

DOB \_\_\_\_\_ Place of Birth \_\_\_\_\_

Spouse's Maiden Name \_\_\_\_\_

Date of Marriage \_\_\_\_\_ Place of Marriage \_\_\_\_\_

Father's Name \_\_\_\_\_

DOB \_\_\_\_\_ Place of Birth \_\_\_\_\_

Mother's Maiden Name \_\_\_\_\_

DOB \_\_\_\_\_ Place of Birth \_\_\_\_\_

**Documents needed to claim death benefits (Check them off and note location of each)**

Copies of report(s) of separation from active duty (DD Form 214, etc.)

Location:

Copies of Retirement Orders

Location:

Copies of Birth and Death Certificates

Location:

Beneficiaries' birth certificate(s) and marriage and/or divorce data

Location:

Social Security data (see Part III)

Location:

VA insurance data (See Part I)

Location:

**You should always have the following on hand (note location of each):**  
(Use separate sheet of paper and attach, if necessary.)

\_\_\_ Updated will and letter of instructions

Location:

\_\_\_ Names of banks, credit unions, etc. (account numbers)

Location:

\_\_\_ Updated list of assets and liabilities

Location:

Insurance policies, numbers, instructions, payments, etc.

Location:

Adoption or naturalization papers (if applicable)

Location:

**Part 1 - Veterans Affairs Data (if applicable)**

VA Compensation \$ \_\_\_\_\_ Disability Claim No. \_\_\_\_\_

Remarks

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VA Insurance Policy No. \_\_\_\_\_ File No. \_\_\_\_\_

Type \_\_\_\_\_ Amount \$ \_\_\_\_\_ / \_\_\_\_\_

Location of policies \_\_\_\_\_

Any known paid-up additional VA Insurance \$ \_\_\_\_\_ Date \_\_\_\_\_

Veteran's Claim Nos. (other)

Patients Data Card No. (if applicable)

Other Remarks:

**Part II - Retirement Pay Data (see retiree account statements)**

Retiree pay data: (as-of date) \_\_\_\_\_

Gross pay \$ \_\_\_\_\_

Deduction \$ \_\_\_\_\_

For \_\_\_\_\_

Deduction \$ \_\_\_\_\_

For \_\_\_\_\_

Deduction \$ \_\_\_\_\_

For \_\_\_\_\_

Deduction \$ \_\_\_\_\_

For \_\_\_\_\_

Net Pay \$ \_\_\_\_\_ Taxable Income \$ \_\_\_\_\_

**Survivor Coverage Information**

Survivor Benefit Plan annuity \$ \_\_\_\_\_ SBP Base Amount \_\_\_\_\_

Supplemental SBP (if any) \$ \_\_\_\_\_ Effective \_\_\_\_\_

RSFPP annuity \$ \_\_\_\_\_

**Part III - Social Security (when applicable)**

Social Security Claim No. \_\_\_\_\_ Month filed \_\_\_\_\_

(No payment is payable for the month of death; call local SSA office for more details)

Type of benefit(s) \_\_\_\_\_ Beginning month of entitlement \_\_\_\_\_

Amount monthly \$ \_\_\_\_\_

Bank/Account. No. (Direct deposit) \_\_\_\_\_

#### **Part IV - Miscellaneous (Things to know and plan for upon death of a retiree)**

\_\_\_ Disposition instructions for the body (burial, cremation, memorial service, etc.)

\_\_\_ Information required for Death Certification:

    Date/Place of birth, Father's Name, Mother's Maiden Name, etc.

\_\_\_ Information required for obituary notice:

    Names, relationships and locations of appropriate relatives, etc.

\_\_\_ Widows will need a new ID card for military, medical, commissary, BX, etc.

\_\_\_ Necessary changes in your DEERS program will have to be made (Tricare, etc.).

\_\_\_ It may take several months to clear estates. You may require at least 8 copies of Death Certificate.

\_\_\_ Contents of your safety deposit box should be known. Make sure the box number, its location and location of key are known.

\_\_\_ Direct deposit of Social Security benefits and military retirement payments (entitlements) must be immediately changed.

\_\_\_ Named beneficiaries on insurance policies become very important (keep current).

\_\_\_ There may be some entitlement to burial benefits for headstone, payments, etc. Check with VA.

\_\_\_ Check with VA for Presidential Memorial Certificate.

\_\_\_ An American flag can be obtained. Check VA and Post Office.

\_\_\_ The survivor should update appropriate will.

\_\_\_ Extra credit cards should be destroyed or canceled.

\_\_\_ Appropriate changes should be made to all joint ownerships.

\_\_\_ Contact insurance companies as appropriate.

\_\_\_ Be prepared to turn in retiree's ID Card where and when required.

Note: Make every effort to retain "original" documents (Provide certified copies whenever possible)

**Fill in and keep the following office phone numbers (Update periodically):**

Casualty Assistance: 877-353-6807 Retiree Activities: \_\_\_\_\_

Hospital (Military): \_\_\_\_\_ Legal Office (Military): \_\_\_\_\_

Airmen and Family Readiness Center: \_\_\_\_\_

VA Hotline: 800-827-1000 Social Security Hotline: 800-772-1213

Finance -- Casualty Reporting: 800-321-1080

Finance -- Retiree Pay: 800-321-1080

SBP – 800-321-1080

ID Card/DEERS Renewal -- 800-334-4162 (Calif.); 800-527-5602 (Alaska and Hawaii); 800-538-9552 (all other states).

**Note:** Spouse/next of kin should have a copy of this document or know where to locate it. Consider letting a third party (family member) know where it is in case something should happen to both the retiree and spouse or next of kin at the same time.

**(This checklist is based on a submission courtesy of Air Force retired Senior Master Sgt. H.K. "Hal" O'Leary of Grants Pass, Oregon.)**