

## Complete These 5 Steps

1. Provide your Spouse or family with AAFMAA's [contact information](#)
2. Keep important documents in a safe place and let your family know where they are
3. Order at least 10 – 15 death certificates for Social Security, Insurance Benefits, change of ownerships, access to safety deposit boxes, tax returns (this can be done through the funeral home)
4. Let your Spouse or family know that they will need to clip or print obituary notices as some insurance companies require a dated newspaper announcement in order to process the claims
5. Be aware of the important documents that AAFMAA Financial Advisors needs in order to process your claims and entitlements:
  - [DD-214](#)
  - Birth Certificates for all dependents
  - Marriage Certificate
  - Divorce Decree
  - Beneficiary date of birth, sex, Social Security numbers, addresses and contact information
  - Wills, Living Will
  - Power of Attorney, Durable, Medical
  - Life Insurance and ANNUITY Policies
  - Trust documents (if applicable): Title page, pages naming

trustees, signature page and any full amendments and trust tax ID number

- Certified Death Certificate