

**LOCATION OF DOCUMENTS**

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

DD214 (all): \_\_\_\_\_

Current retired pay statement: \_\_\_\_\_

Marriage certificate(s): \_\_\_\_\_

Divorce decree(s)/property settlements(s)(from previous marriages of retiree or spouse):  
\_\_\_\_\_

Death certificate(s) (from previous marriages of retiree or spouse):  
\_\_\_\_\_

Birth certificates/adoption papers (retiree, spouse, children):  
\_\_\_\_\_

Retirement Orders or 20-year Letter: \_\_\_\_\_

Safe deposit box (list contents): \_\_\_\_\_  
\_\_\_\_\_

Insurance policies: \_\_\_\_\_

Tax returns: \_\_\_\_\_

Investment papers (CDs, Mutual Funds, IRA, etc.):  
\_\_\_\_\_

Burial plot information: \_\_\_\_\_

Medical and dental records: \_\_\_\_\_

Real estate deeds: \_\_\_\_\_

**PHONE NUMBERS/WEBSITES**

**Casualty Assistance Office** (call upon retiree's death):  
1-800-626-3317; from overseas, call collect (502) 613-3317  
<https://www.hrc.army.mil/site/Active/tagd/CMAOC/CasualtyAssistance/reportingadeath.htm>

**Retirement Services Office** (follow-up assistance):  
Pages 13/14 of Army Echoes  
<http://www.armyg1.army.mil/rso/rso.asp>

Retired/Annuitant Pay: 1-800-321-1080 <http://www.dfas.mil>

VA: 1-800-827-1000 <http://www.va.gov>

Social Security: 1-800-772-1213 <http://www.ssa.gov>

Update ID card information: 1-800-538-9552; (831) 583-2500

WEBSITE: <http://www.armyg1.army.mil/retire>

For more information on retirement topics, here are some of the pamphlets, prepared by HQDA, Army Retirement Services, 200 Stovall Street, Alexandria, VA 22332-0470, and available from your Retirement Services Officer (RSO):

Retirement Services Offices

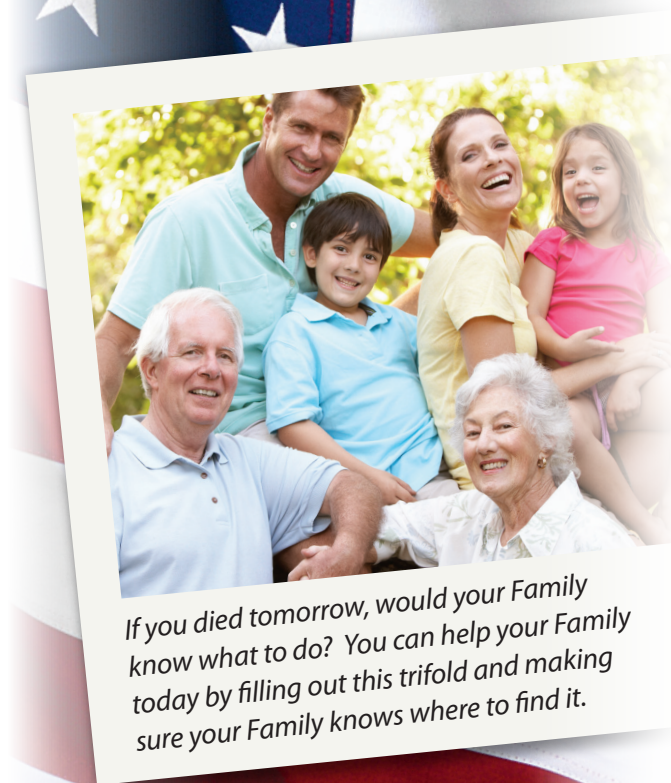
The Survivor Benefit Plan (SBP) Basic Questions Answered

Survivor Benefit Plan — Facts vs. Myths

Uniformed Services Former Spouses' Protection Act



# RETIREE CASUALTY ASSISTANCE CHECKLIST



*If you died tomorrow, would your Family know what to do? You can help your Family today by filling out this trifold and making sure your Family knows where to find it.*

# RETIREE CASUALTY ASSISTANCE CHECKLIST

## RETIREE INFORMATION

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

Social Security number: \_\_\_\_\_

Date and place of birth: \_\_\_\_\_

\_\_\_\_\_

Date of retirement: \_\_\_\_\_

Retired grade/rank: \_\_\_\_\_

## SURVIVOR BENEFIT PLAN

Enrolled in **RSFPP** **SBP** **RCSBP**  
(Circle any that apply)

Did you disenroll? **YES** **NO**

## VA CLAIM #:

Eligible to draw VA disability compensation: **YES** **NO**

Receiving Social Security? **YES** **NO**

If YES, age first received: Years: \_\_\_\_\_ Months: \_\_\_\_\_

Organ donor: **YES** **NO**

## SPOUSE INFORMATION

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

Date of birth: \_\_\_\_\_

Social Security number: \_\_\_\_\_

Date of marriage: \_\_\_\_\_

Place (City, County, State): \_\_\_\_\_

## CHILDREN INFORMATION

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

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

Date of birth: \_\_\_\_\_

Incapable of self-support? **YES** **NO**

## INSURANCE POLICIES

Policy #: \_\_\_\_\_

Company: \_\_\_\_\_

Amount (include "as of" date): \_\_\_\_\_

Beneficiary: \_\_\_\_\_

Agent phone/email: \_\_\_\_\_

## INVESTMENTS

Type (IRA, CD, Mutual Fund): \_\_\_\_\_

Amount (include "as of" date): \_\_\_\_\_

Agent phone/email: \_\_\_\_\_

## BANK ACCOUNTS

Bank & phone/website: \_\_\_\_\_

Type of acct: \_\_\_\_\_

Amount (include "as of" date): \_\_\_\_\_

Account #: \_\_\_\_\_

## CREDITOR

Name & address: \_\_\_\_\_

Phone/email: \_\_\_\_\_

Account #: \_\_\_\_\_

Balance Due (include "as of" date): \_\_\_\_\_

## BURIAL INFORMATION

I would like to be: **Buried** **Cremated**

### **Who should be notified of your death:**

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

Relationship: \_\_\_\_\_

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

Phone #: \_\_\_\_\_

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

Relationship: \_\_\_\_\_

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

Phone #: \_\_\_\_\_

Name of cemetery where you want to be buried or have your ashes inurned:  
\_\_\_\_\_

Do you want to be buried in your uniform? **YES** **NO**

Do you want a funeral? **YES** **NO**

If YES, where? \_\_\_\_\_

Do you have a preference of funeral home? **YES** **NO**

If YES, which one? \_\_\_\_\_

Do you want a military honor guard? **YES** **NO**

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