

SURVIVORS GUIDE



(Retiree Preparation Guide)
SEP 2013

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This guide is designed to assist the Survivor in settling the retiree's affairs. Please contact the Fort Lee Casualty Assistance Center at (804) 734-6606 or by email at usarmy.lee.imcom.mbx.lee-ima-cas@mail.mil for any comments referring to this guide.

1. Reporting the retiree's death. When a retiree dies it is important to report the retiree's death to Defense Finance and Accounting Services (DFAS) as soon as possible. Any regular retired pay received after the retiree's death will be reclaimed by DFAS. You can report the death by completing a "Notification of Death Fast Form" online at <http://www.dfas.mil/retiredmilitary/survivors/Retiree-death.html>. Upon notification, DFAS will stop monthly payments to prevent any overpayment. If you cannot complete the "Notification of Death Fast Form", call DFAS at 1-800-321-1080 (ensure you have the decedent's and your personal information handy when you call).

Within two weeks after reporting the death you should receive a letter from DFAS along with a **SF 1174 (Claim for Unpaid Compensation of Deceased Member of the Uniformed Service)** and **DD Form 2656-7 (Verification of Annuity)** account forms and instructions (if the decedent participated in the Survivor Benefit Program). Complete the forms you received with your letter and return them to the address indicated in the letter along with a certified copy of the retiree's death certificate. If you need additional assistance contact the Fort Lee CAC at (804) 734-6606/6985. If the retiree was retired from a service other than the Army, contact the applicable service casualty assistance office. All service casualty assistance offices are listed below:

Service Casualty Assistance Offices

**Army Fort Lee – (804) 734-6606/6724/6985
Army Casualty 1-800-626-3317**

Air Force – (757) 764-5231 / 1-800-433-0048

Marine Corps – (703) 784-9512 / 1-800-847-1597

Navy – 901-874-2501 / 1-800-368-3202

Coast Guard – (757) 686- 4032

2. Survivor Assistance. The Fort Lee Casualty Assistance Center is always available to assist survivors of Army retirees. When requesting assistance we can help in the following ways:

a. Self Service. We can mail you the applicable forms with instructions for completion. We will provide you with a self addressed envelope (requiring postage) to return the completed forms. You should also provide us with a copy of your marriage certificate and the retiree's death certificate. A benefits coordinator will be available for any questions you might have. We will process your claims for you.

b. Full Service. You can call our benefits coordinator (804-734-6985) and make an appointment. The benefits coordinator will help you complete and process all applicable claim forms. Bring your ID card, a copy of your marriage certificate and the retiree's death certificate.

c. Personalized Service . You may also request a Casualty Assistance Officer to help complete and process all applicable forms. The Casualty Assistance Officer will visit you. When requesting a CAO it may take a few days to match a CAO to your family.

3. Retiree Pay Account.

a. Unpaid Pay and Allowances. When the retiree dies, their final paychecks and any other money owed to them are sent to the person they designated as beneficiary or surviving family member. Once the retiree's death is reported to DFAS, **DFAS will reclaim the retiree's final month's pay** and audit the account. Any remaining amount owed to the retiree will then be paid to the designated AOP beneficiary. To apply, complete SF 1174.

b. Survivor Benefit Plan. If the retiree participated in the Survivor Benefits Plan, the surviving spouse or dependent child(ren) may be eligible for an annuity. To apply for the survivor annuity complete DD Form 2656-7 (Verification for Survivor Annuity), a Direct Deposit Sign-up Form, and Form W4-P (Withholding Certificate for Annuity payments).

4. Veterans Administration. Report the retiree's death to the Veteran's Administration at **1-800-827-1000** and inquire of benefits. Some benefits that you may be eligible for are listed below. You can visit their website at: <http://www.va.gov/>

a. Burial in a national or state veteran cemetery. The Veterans Administration maintains a listing of national and state veteran cemeteries. Space may be limited in some national cemeteries and eligibility varies in many state cemeteries. Most include covered expenses for the gravesite, a headstone or marker, opening and closing the grave and perpetual care. Contact the VA for further information or visit the national cemetery administration website at: http://www.cem.va.gov/cems_nmc.asp

b. Headstone, marker or medallion. To apply for a headstone, marker or medallion, complete VA Form 40-1330 and forward it to: Director, Memorial Programs Service (41B), Department of Veterans Affairs, 5109 Russell Road, Quantico, VA 22134-3903 or fax to 1-800-455-7143. Should you have questions when filling out this form, you may contact the Applicant Assistance Unit toll free at: 1-800-697-6947, or via e-mail at mps.headstones@va.gov. (For more information regarding headstones and markers visit their website at www.cem.va.gov.)

c. Presidential Memorial Certificates. A Presidential Memorial Certificate (PMC) is an engraved paper certificate, signed by the current President, to honor the memory of honorably discharged deceased Veterans. Eligible recipients, or someone acting on their behalf, may apply for a PMC in person at any VA regional office or complete VA Form 40-0247 and fax to **1-800-455-7143**. (For more information regarding a PMC visit the VA website at www.cem.va.gov.)

d. Burial Allowance. In certain circumstances, a burial allowance is available from the Veterans Benefits Administration. See the VA information sheet for details.

<http://www.vba.va.gov/VBA/benefits/factsheets/burials/Burial.pdf>

e. Dependency Indemnity Compensation (DIC). A monthly benefit paid to survivors based on a service member's service connected disability. See the VA information sheet for details.

A Veteran's Affairs Claim Agent is usually available Wednesday and Thursday from 9am-5pm at the Soldier Support Center, Bldg 3400, RSO, Room 107. Contact 804-675-6546 to make an appointment.

Burial and Plot-Interment Allowances

What Are VA Burial Allowances? VA burial allowances are partial reimbursements of an eligible veteran's burial and funeral costs. When the cause of death is not service related, the reimbursements are generally described as two payments: (1) a burial and funeral expense allowance, and (2) a plot or interment allowance.

Who Is Eligible?

You may be eligible for a VA burial allowance if:

- you paid for a veteran's burial or funeral, **AND**
- you have not been reimbursed by another government agency or some other source, such as the deceased veteran's employer, **AND**
- the veteran was discharged under conditions other than dishonorable.

In addition, at least one of the following conditions must be met:

- the veteran died because of a service-related disability, **OR**
- the veteran was receiving VA pension or compensation at the time of death, **OR**
- the veteran was entitled to receive VA pension or compensation, but decided not to reduce his/her military retirement or disability pay, **OR**
- the veteran died while hospitalized by VA, or while receiving care under VA contract at a non-VA facility, **OR**
- the veteran died while traveling under proper authorization and at VA expense to or from a specified place for the purpose of examination, treatment, or care, **OR**
- the veteran had an original or reopened claim pending at the time of death and has been found entitled to compensation or pension from a date prior to the date of death, **OR**
- the veteran died on or after October 9, 1996, while a patient at a VA-approved state nursing home.

How Much Does VA Pay?

Service-Related Death. VA will pay up to \$2,000 toward burial expenses for deaths on or after September 11, 2001. VA will pay up to \$1,500 for deaths prior to September 10, 2001. If the veteran is buried in a VA national cemetery, some or all of the cost of transporting the deceased may be reimbursed.

Nonservice-Related Death. For deaths on or after October 1, 2011, VA will pay up to \$700.00 toward burial and funeral expenses (if hospitalized by VA at time of death), or \$300 toward burial and funeral expenses (if not hospitalized by VA at time of death), and a \$700.00 plot-interment allowance (if not buried in a national cemetery). For deaths on or after December 1, 2001, but before October 1, 2011,

VA will pay up to \$300.00 toward burial and funeral expenses and a \$300.00 plot-interment allowance. The plot-interment allowance is \$150.00 for deaths prior to December 1, 2001. If the death happened while the Veteran was in a VA hospital or under VA contracted nursing home care, some of all of the costs for transporting the Veteran's remains may be reimbursed.

How Can You Apply? You can apply by filling out VA Form 21-530, *Application for Burial Benefits*. You should attach a copy of the veteran's military discharge document (DD 214 or equivalent), death certificate, funeral and burial bills. They should show that you have paid them in full. You may download the form at: <http://www.va.gov/vaforms/>.

Dependency and Indemnity Compensation (DIC)

What is DIC? DIC is a monthly benefit paid to eligible survivors of a military service member who died while on active duty, active duty for training, or inactive duty training, **OR**

- veteran whose death resulted from a service-related injury or disease, **OR**
- veteran whose death resulted from a non service-related injury or disease, and who was receiving, or was entitled to receive, VA Compensation for service-connected disability that was rated as totally disabling
 - for at least 10 years immediately before death, **OR**
 - since the veteran's release from active duty and for at least five years immediately preceding death, **OR**
 - for at least one year before death if the veteran was a former prisoner of war who died after September 30, 1999.

Who Is Eligible?

The *surviving spouse* if he or she:

- validly married the veteran before January 1, 1957, **OR**
- was married to a service member who died on active duty, active duty for training, or inactive duty training, **OR**
- married the veteran within 15 years of discharge from the period of military service in which the disease or injury that caused the veteran's death began or was aggravated, **OR**
- was married to the veteran for at least one year, **OR**

- had a child with the veteran, **AND**
- cohabited with the veteran continuously until the veteran's death or, if separated, was not at fault for the separation, **AND** is not currently remarried.*

Note: A surviving spouse who remarries on or after December 16, 2003, and on or after attaining age 57, is entitled to continue to receive DIC.

The **surviving child(ren)**, if he/she is not included on the surviving spouse's DIC, unmarried and under age 18, or between the ages of 18 and 23 and attending school.

Note: Certain helpless adult children are entitled to DIC. Call the toll-free number below for the eligibility requirements.

How Much Does VA Pay?

The basic monthly rate of DIC is \$1,215 for an eligible surviving spouse. The rate is increased for each dependent child, and also if the surviving spouse is housebound or in need of aid and attendance. VA also adds a transitional benefit of \$301 to the surviving spouse's monthly DIC if there are children under age 18. The amount is based on a family unit, not individual children.

How Should a Claimant Apply?

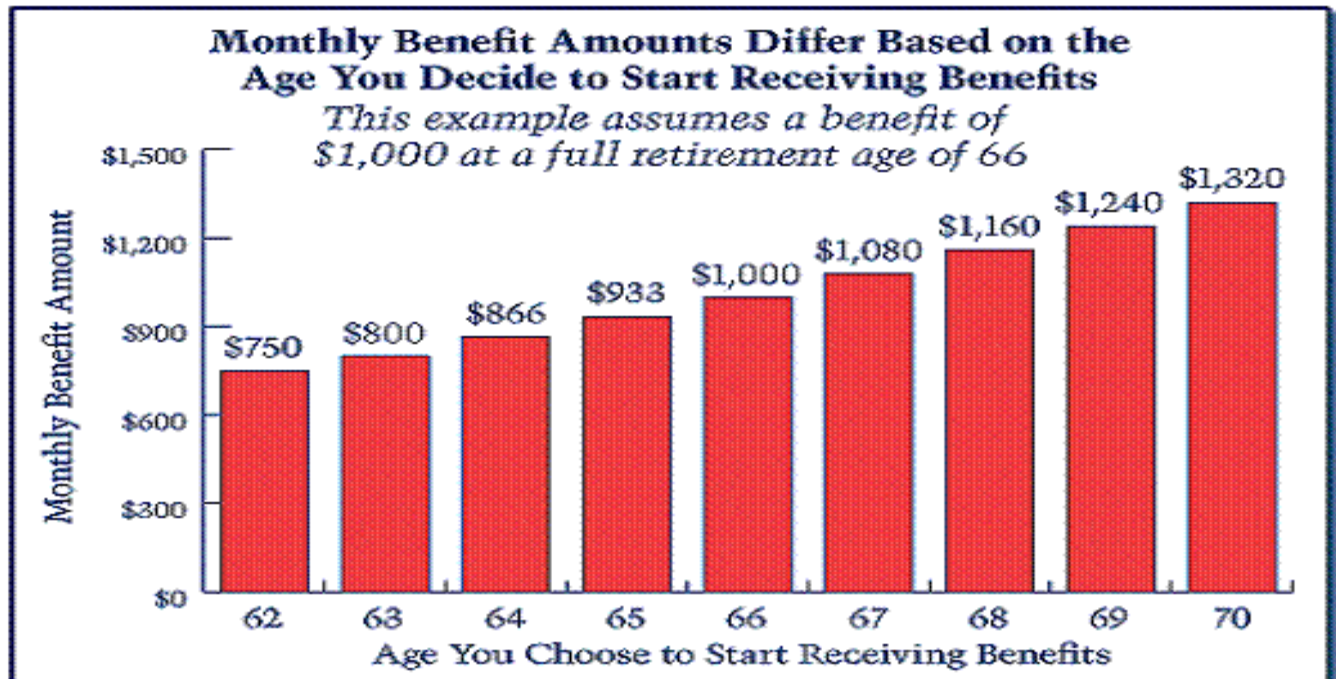
Claimants should complete VA Form 21-534 *Application for Dependency and Indemnity Compensation, Death Pension and Accrued Benefits by a Surviving Spouse or Child*.

5. Social Security. Your decision is a personal one. Would it be better for you to begin receiving benefits early with a smaller monthly amount or wait for a larger monthly payment later that you may not receive as long? The answer is highly personal and depends on a number of factors, such as your current cash needs, your health and family longevity, whether you plan to work in retirement, whether you have other retirement income sources, your anticipated future financial needs and obligations, and, of course your future Social Security benefit. You should weigh all the facts carefully and consider your own circumstances before making the important decision about when to begin receiving Social Security benefits.

- a. **Monthly payments differ substantially based on when you start receiving benefits.** If you live to the average life expectancy for someone your age, you will receive about the same amount in lifetime benefits no matter whether you choose to start receiving benefits at age 62, full retirement age, age 70 or any age in between. However, monthly benefit amounts can differ substantially based on your retirement age. Basically, you can get lower monthly payments for a longer period of time or higher monthly payments over a shorter period of time. The amount you receive when you first get benefits sets the base for the amount you will

receive for the rest of your life, though you do receive annual cost-of-living adjustments and, depending on your work history, may receive higher benefits if you continue to work.

The following chart provides an example of how your monthly benefit amount can differ based on the age at which you decide to start receiving benefits.



6. Life Insurance. Gather all life insurance policies. Check safe deposit boxes, files or papers kept by the retiree. Civilian Insurance policies should have a company or agent to contact. Contact the company or agent to report the retiree's death and ask for instructions on how to apply for the benefits. Usually the death certificate and a claim form or a letter with pertinent information on the retiree and beneficiary is all that is needed for the insurance company to pay the claim.



"If I die, why do I
need money?"

You don't -- but your family, your business
or your favorite charity might.

LIFE INSURANCE

7. ID Cards. Survivors eligible for DD Form 1173 (Uniformed Services Identification and Privilege Card) should have new cards issued under their new status as soon as possible. You will need a copy of the death certificate, marriage certificate, retirement orders and copies of birth certificates of any eligible children. Contact the nearest military installation ID Card section for details. They service all branches of the Armed Forces. See the list below for frequently visited ID Card sites. For a list of additional sites visit the DEERS Site Locator: <http://www.dmdc.osd.mil/rsl>. Also you can make appointments online at:

<https://rapids-appointments.dmdc.osd.mil/default.aspx>

Fort Lee

(804) 734-7349/7348/7347/6179

Mon, Wed, Fri - 0800-1600

(Appointment Only)

Tues, Thurs – 0800-1240

(Appointment Only)

1300-1530 (Walk-In)

Charlottesville (Jag School)

(434) 971-3288 / 3300

Mon-Fri – 0800-1600

(Appointment Only)

Roanoke (Naval Reserve)

(540) 563-9723 / (540) 309-2563

Mon-Fri - 0730-1630

(Appointment Only)

Richmond – DSCR

(804) 279-4754/1020

Mon-Fri - 0630-1630

(First Come First Served)

Fort Pickett
(434) 292-2497
Tues-Fri - 0700-1730

Fort A.P. Hill
(804) 633-8797/8722
Mon-Fri - 0800-1600

(Call for an appointment; no walk-ins accepted)

8. Funeral Honors. The Fort Lee Casualty Assistance Office is responsible for providing military funeral honors to eligible deceased Army personnel within 63 counties located in central and southwestern Virginia. This includes, Active Duty, Reserve, National Guard, Retirees and Veterans. Full military funeral honors will be provided for all deceased Active Duty Soldiers and Medal of Honor recipients. A full military funeral honors team consists of nine soldiers who perform as pallbearers (at the gravesite), a firing team, flag folders, a chaplain (if requested, subject to availability) and a bugler (if available). If a bugler is not available, "TAPS" will be rendered by a ceremonial bugle. Full military funeral honors will be provided for Army Retirees when resources permit. If resources do not permit, a two-member abbreviated team will render the honors. Funeral Honors for all other Army Veterans will consist of two members to fold and present the flag to the Next-of-Kin and "TAPS" will be rendered by a ceremonial bugle. Funeral Honors offices:

Army Fort Lee – (804) 734-6606

Air Force – (757) 764-7181 / 1-800-531-5803
(Weekends/Holidays) – (757) 810-9499

Marine Corps – 1-866-826-3628

Navy – (757) 322-2817 / 202-685-1568

Coast Guard – (757) 686-4116 / (757) 617-4971

9. Virginia National Cemeteries. If the retiree requests his/her burial in a National Cemetery in Virginia, below is a list:

Alexandria, Ball's Bluff, City Point, Cold Harbor, Culpepper, Danville, Fort Harrison, Glendale, Hampton, Hampton (VAMC), Quantico, Richmond, Seven Pines, Staunton, and Winchester.

For more information you can access the Department of Veterans Affairs website at:

<http://www.cem.va.gov/cem/cems/state.asp?State=VA&dnum=ALL>

10. Federal Service. If the deceased retired from Federal Service, the survivor may be due benefits. Contact Employee Service and Records at **1-888-767-6738** or **P.O. Box 45, Boyers, PA 16067**.

11. Death of an Annuitant. If a person receiving an annuity from a deceased member's military retirement dies, report their death to Annuitant Pay at **1-800-321-1080**. This will stop their pay; DFAS will then mail a claim form for the unpaid pay. Complete the form and return to DFAS for payment. Any check received after the date of death will be subject to return.

Preparation Checklist

(to be completed by retirees and spouses and kept in your files for your survivors to use)

1. Personal Information

Name of Person Filling Out Form: _____

Date and Time of Drafting Form: _____

Name of Person who died: _____

Date and Time of Death: _____

Date of Birth: _____

Place of Birth: _____

Social Security Number: _____

Service in the US Armed Forces, if applicable: _____

Marital Status: _____

Spouse's Name / Maiden Name: _____

Occupation and Type of Business: _____

Residence Address: _____

How Long He/She Resided in this County: _____

Names of Parents: Father's Name and Mother's Maiden Name: _____

Birth State and County of Father and Mother: _____

Level of Education: _____

Preferred Form of Disposition (if known): _____

Immediate Help

Place of Burial or Disposition: _____

Name, Address, and Phone Number of Certifying Physician: _____

Person Authorized for Disposition: _____

Note: Not all of the above information may be applicable, some information may be deemed necessary if you are taking care of the surviving family or the deceased estate.



2. Who Will Make the Decisions?

Is there a Power of Attorney for Health Care? Yes No

Name of Power of Attorney for Health Care: _____

Contact information: _____

If there is not, list the Surviving Spouse and/or Legal Next of Kin:

1) Name: _____ Relationship: _____

Contact Information: _____

2) Name: _____ Relationship: _____

Contact Information: _____

3) Name: _____ Relationship: _____

Contact Information: _____

Note: If same-sex partners have not set up Power of Attorney for Health Care for each other, or are not state-registered domestic partners, then the next of kin of the person who died will have the legal right to make decisions, not the partner.

3. What Important Documents Do I Need?

Check off the following documents as you locate them:

Last Will and Testament

Prepaid Disposition Plan

Organ/Body Donor Registration Info

Check off the following documents as you or someone else completes them:

Death Certificate

Prepaid Disposition Plan

Burial Transit Permit

Is there a prepaid disposition plan (a contract for a burial plot, cremation, disposition products, or services from a funeral provider)? Yes No

Is there a chosen services provider or funeral director? [] Yes [] No

Name of Services Provider or Funeral Director: _____

Contact information: _____

Have any of these disposition products been prepaid for:

[] Burial Site

[] Casket

[] Urn

[] Other (list): _____

Is there a Payable on Death Account or Totten Trust? [] Yes [] No

Is there a funeral or burial insurance policy? [] Yes [] No

Name of insurance policy provider: _____

Policy Number: _____

List any additional disposition instructions that the person left behind: _____

Completing the Death Certificate

A funeral service provider will typically fill out the death certificate. Refer to the Personal Information portion of the checklist for help in filling it out if you have taken on this responsibility.

4. Which Family and Friends Do I Need to Contact?

Who needs to be notified immediately? If there is somebody who can help you in making some or all of the phone calls or after-death arrangements and preparations, put a note by their name.

Family to Notify (Spouse, Children, Parents, Siblings, Grandparents, etc.):

1) Name: _____ Contact: _____ Can Assist? _____

2) Name: _____ Contact: _____ Can Assist? _____

3) Name: _____ Contact: _____ Can Assist? _____

4) Name: _____ Contact: _____ Can Assist? _____

5) Name: _____ Contact: _____ Can Assist? _____

Friends and/or Co-Workers to Notify:

1) Name: _____ Contact: _____ Can Assist? _____

2) Name: _____ Contact: _____ Can Assist? _____

3) Name: _____ Contact: _____ Can Assist? _____

4) Name: _____ Contact: _____ Can Assist? _____

5) Name: _____ Contact: _____ Can Assist? _____

Others to Notify or to Ask for Assistance:

1) Caregiver: _____ Contact: _____ Can Assist? _____

2) Hospice Worker: _____ Contact: _____ Can Assist? _____

3) Other(s): _____ Contact: _____ Can Assist? _____

5. Are There Dependents That Need Immediate Consideration?

Is there somebody who can help you attend to those who need immediate assistance?

Name: _____ Contact: _____

List any dependents including children, a spouse, or elderly or disabled dependents.

1) Name: _____ Relationship: _____

Contact Information: _____

2) Name: _____ Relationship: _____

Contact Information: _____

3) Name: _____ Relationship: _____

Contact Information: _____

4) Name: _____ Relationship: _____

Contact Information: _____

5) Name: _____ Relationship: _____

Contact Information: _____

Do any of the dependents need temporary care or day care until permanent arrangements are made? [] Yes [] No

List needs: _____

List any pets that need care:

1) Name: _____ Type: _____

2) Name: _____ Type: _____

3) Name: _____ Type: _____

4) Name: _____ Type: _____

5) Name: _____ Type: _____

List any special considerations: _____

6. Which Authorities Do I Need to Contact:

Fort Lee Casualty Assistance Center (804) 734-6606.

Department of Veterans Affairs (800) 827-1000

Social Security

Office of Personnel Management (888)767-6738

If the Person Passed in an Assisted Living Home, State Facility, or Hospice

You will likely have to make arrangements to move the deceased from the facilities within a day, as most assisted living communities do not have a morgue or storage facility.

Call a local funeral service provider

If the Person Passed at Home, With or Without Hospice

Call a local funeral service provider

If you would like natural death care, call a home funeral consultant

7. DNA Testing

Did the person want a DNA sample recorded? Yes No Don't Know

If unknown, do you wish to have a DNA sample recorded? Yes No

Select DNA sampling provider

Receive instructions on how to obtain and preserve a DNA sample (record below):

Name of DNA sampling company: _____

Contact information: _____

Record special instructions for obtaining and preserving a DNA sample: _____

8. Organ Donation

Did the deceased wish to donate their organs? Yes No Don't Know

Did the deceased prearrange donation of specific organs for research or to a chosen organization?

Yes No

Name of Organization: _____

Contact information: _____



Notify organization/facility

If the person's wishes are unknown, check all of the following places for donor information:

Driver's License

Family Member

Physician

Organ Donor Consultant at Hospital

Living Will

Advance Directives

If the deceased did not specify wishes regarding donation, do I wish to make the decision to donate? Yes No

Name of Donor Organization or Facility: _____

Contact information: _____

Did the deceased specify what he or she wanted to donate; or, if not, do you have a preference as to what to donate? (Check all that apply.)

Whole body to science

Organs

Heart

Kidneys

Liver

Lungs

Pancreas

Pancreas for islet cells

Small intestine

Other

- Bones
- Eyes / Corneas
- Heart valves
- Pericardium
- Soft tissue (such as ligaments, tendons, blood vessels)
- Skin grafts
- Vertebral bodies

9. Transport of remains or Cremated Ashes

I am transporting:

- Body
- Cremated Ashes

I am transporting:

- Between states
- From outside the U.S.

Transporting Cremated Ashes between States

Do you want to mail through the U.S. Postal Service? Yes No

Do you want to ship through an airline cargo service? Yes No

Name of Airline: _____

Contact information: _____

Do you want to carry the ashes with you on a flight? Yes No

Container I Will Use: _____

Do you want to transport via car or van? Yes No

Check state and local laws

Obtain Burial Transit Permit (if applicable)

Transporting Body between States

Do you want to work through your funeral director or service provider? Yes No

Do you want to ship through an airline cargo service? Yes No

Name of Airline: _____

Contact information: _____

Do you want to transport via car or van? Yes No

Check state and local laws

Arrange embalming in state of origin (if applicable)

Obtain Burial Transit Permit (if applicable)

Transporting from Outside the United States

Notify U.S. embassy or consular official in country of death

Special disposition considerations in country of death: _____

Would you like to have the person cremated in the country of death? Yes No

Cost: _____

Contact U.S. Department of State or U.S. consular officer for proper documentation

If possible, would you like to have the body shipped back to the U.S.? Yes No

Contact U.S. Department of State or U.S. consular officer for proper documentation

Arrange with funeral director or service provider in U.S. to pick up body at airport

10. Announcement or Obituary

Do you want to place an announcement? Yes No

Which type(s) of announcement?

Print Obituary

Online Obituary

Letter

Email

If online or print obituary, what service or publication do you want to use? _____

Contact information: _____

Is there someone who can help you prepare an announcement or obituary? Yes No

Name: _____ Contact: _____

Announcement or Obituary Checklist

Select Photos or Images

Purchase necessary cards or supplies

Compile an email or address list

Write notes or draft your announcement or obituary: _____

Choosing Disposition

1. Protecting Your Consumer Rights

Here are a few things to keep in mind as you are shopping for disposition services.

Check off those that apply:

Securing Disposition

- Request a General Price List from your service provider. Remember, they cannot bundle items into “packages” without also listing their individual prices.
- You are only required to pay a basic services fee to your service provider in addition to any goods and services you have specifically requested.
- Contact the Funeral Consumers Alliance at (802) 865-8300 if you need assistance when purchasing disposition.

2. Choosing Cremation

- I would like Cremation
- I would like Direct Cremation

Preferred Service Providers

- Funeral Home _____
- Cremation Retailer _____
- Crematorium _____
- Funeral Home and Crematorium _____
- Funeral Home, Crematorium and Cemetery _____

List Potential Service Providers and Pricing

- 1) Service Provider: _____ Item: _____ Price: _____
- 2) Service Provider: _____ Item: _____ Price: _____
- 3) Service Provider: _____ Item: _____ Price: _____

4) Service Provider: _____ Item: _____ Price: _____

5) Service Provider: _____ Item: _____ Price: _____

Note: Include all funeral and disposition services, including direct cremation and transporting remains, etc.

I Would Like the Following Cremation Products

Shroud

Cardboard Box

Casket

Urn

Keepsake Urn(s) Quantity: _____

Documentation

Do you have all the proper documentation? (check all that apply)

Disposition Permit Burial Transit Permit Cremation Permit

Declaration for Disposition of Cremated Remains

Options for Cremation Ashes

I would like to hire a scattering service

Scattering service provider: _____

Internment at a columbarium Address: _____

Any additional options: _____

Witnessing the Cremation

I would like to witness the cremation

Number of family members or friends attending? _____

If allowed, I would like to witness the full duration of the cremation

If allowed, I would like to provide refreshments for guests

I would like to offer a keepsake urn to each guest

3. Choosing Natural Burial

I would like Natural Burial

1) Service Provider: _____ Item: _____ Price: _____

2) Service Provider: _____ Item: _____ Price: _____

3) Service Provider: _____ Item: _____ Price: _____

If legal, I would like a Natural Burial on private property.

Special Considerations: _____

Note: Include disposition, including opening and closing a grave, graveside services, etc.

I Would Like the Following Natural Burial Products

Shroud Cardboard Box

Green Casket Type of material: _____

4. Other Forms of Disposition

I would like a Burial at Sea

1) Service Provider: _____ Item: _____ Price: _____

2) Service Provider: _____ Item: _____ Price: _____

I would like Cryonics

1) Service Provider: _____ Item: _____ Price: _____

2) Service Provider: _____ Item: _____ Price: _____

I would like Alkaline Hydrolysis

Service Provider: _____ Item: _____ Price: _____

Settling the Estate

1. Initial Tasks

Here are a few of the outstanding tasks to consider as you are settling the estate.

Check off those that apply:

Trustee

Has the trustee or executor been determined? Yes No

If yes, list them here: _____

Tasks to Consider

Collect the mail

Pay the bills

Secure tangible property

Lock residence

Do any locks need to be changed? Yes No

If yes, which ones? _____

Lock vehicle(s)

- Notify credit card companies
- Notify credit reporting agencies
- Notify employer
- Arrange for final paychecks
- Notify Social Security
- Notify Veterans Affairs Administration

Are there any debts that need to be settled? Yes No

If yes, list them here: _____

Are there benefits that need to be collected? Yes No

If yes, list them here: _____

2. Administering and Distributing Assets

Do you want to hire an attorney to help in this process? Yes No

Name of Attorney: _____

Contact information: _____

Was there a revocable living trust? Yes No

If not, the property may be subject to probate.

Was there a will? Yes No

If not, who under state law will inherit the property? _____

Does your loved one's estate qualify as a small estate? Yes No

If yes, complete paperwork to transfer property to beneficiaries

Did you own joint property with the person who passed? Yes No

If yes, complete paperwork to remove person's name from property's title

Was there a pay-on-death account or Totten Trust? Yes No

If yes, notify banks where POD accounts are held and provide copies of death certificate

Was there a life insurance policy and/or retirement plan? Yes No

If yes, notify institutions holding policies and/or retirement plan of person's death

3. Minors and Dependent Adults

Did the person leave behind minor children? Yes No

Does the will nominate a guardian? Yes No

Has the Court approved of the nominated guardian? Yes No

Name of guardian: _____

Was property left to the minor children? Yes No

If yes, name of trustee: _____

If no trustee, name Court-approved guardian of the estate: _____

Did the person leave behind dependent adults? Yes No

If yes, do the dependent adults have durable power of attorney? Yes No

Do the dependent adults have a living trust? Yes No

If yes, name of trustee: _____

If no, name of Court-approved conservator: _____

4. Tax Considerations

Do estate taxes need to be filed? Yes No

Appraise real estate property

Value of person's total estate: _____

Is it subject to a federal estate tax? Yes No

Is it subject to a state estate tax? Yes No

Pay federal estate tax

Pay state tax

File income tax

Obtain Tax ID number

If you are selling inherited property: is it subject to capital gains tax? Yes No

Pay capital gains tax

5. Insurance

Homeowners and Renters Insurance

Does property in the Estate or Trust have homeowners or renters insurance?

Yes No

Notify insurance company of death in writing

Request that Estate be added to the policy as "named insured"

Automobile Insurance

Do you want to maintain the automobile insurance? Yes No

Notify insurance company of death in writing

If the vehicle will be idle or sold, do you want to cancel the automobile insurance?

Yes No

If yes, register the vehicle for "planned non-operation" with the DMV

Health Insurance

Are the surviving spouse and/or dependents eligible for continued coverage?

Yes No

Contact insurance company

6. Assets of the Estate

Personal Residence

Did the person rent his or her home? Yes No

Terminate lease

Vacate premises

Place tangible property in storage

Did the person own his or her home? Yes No

Person to whom the home was bequeathed: _____

If the home has not been bequeathed, are there beneficiaries interested in taking ownership?

Yes No

Names of beneficiaries: _____

Do you want to sell the property? Yes No

If yes, title search completed

If the residence is underwater, you will need to pursue one of the following:

Foreclosure

Deed in lieu of foreclosure

Short sale

Do you want to hire an Attorney or Realtor? Yes No

If yes, name of Realtor: _____

Contact information: _____

Were surviving spouse, minor children or other family members residing with the person at time of death? Yes No

Based on your state laws, are surviving family members allowed to remain in the residence?

Yes No

If yes, for how long? _____

Other Real Estate

Address of real estate:

1) _____

2) _____

3) _____

Are there tenants on the person's properties? Yes No

Locate lease agreement(s)

Arrange for rent to be sent to Executor/Trustee

Did the person hire a property management company? Yes No

Request property management agreement

Do you want to sell the property? Yes No

Arrange for removal of tenants, if applicable

Bank Accounts

Retitle bank accounts to Estate

Business Interests

Did the person own a small business? Yes No

Will you arrange for its continued operation? Yes No

Locate instructions for business in Will or Trust

Contact co-owners or senior staff

Will you close, sell, or liquidate the business? Yes No

Have the business valued by appraiser

Tangible Property

Identify items specifically bequeathed

Secure bequeathed items prior to distribution

Appraise valuable items

Divide remaining tangible property

Do you want to have an estate sale? Yes No

Do you want to hire a company to hold the estate sale? Yes No

Name of Estate Sale Company: _____

Contact information: _____

Divide net proceeds from estate sale to beneficiaries

Do you want to make donations of tangible property items? Yes No

List places you can donate the following items, if applicable:

1) CDs and DVDs: _____

2) Computers and electronics: _____

3) CDs and DVDs: _____

4) Children's toys and books: _____

5) Art supplies: _____

6) Furniture: _____

7) House ware: _____

8) Clothing: _____

9) Vehicles: _____

10) Other: _____

Leftover Medications

Are there leftover medications you need to dispose of? Yes No

Take-back center near me: _____

Do you want to donate leftover medications? Yes No

Name of organization to donate to: _____

Contact information: _____

Asset Search Services

Do you believe that other unidentified property exists? Yes No

Hire asset search service

Name of asset search service: _____

Contact information: _____

Search state databases

7. Digital Death

Did the person make arrangements, either in their will or through an online service, for their online accounts? Yes No

Check for accounts using online service

Name of online service: _____

Contact information: _____

Contact email providers

Contact Facebook



DIRECTORY OF FREQUENTLY CALLED TELEPHONE NUMBERS

The telephone numbers listed below will be helpful in the settlement of personal affairs. The list may not be a complete telephone number to every agency; however, the list does include the most frequently contacted agencies.

- Fort Lee Casualty Office (Bldg 3400) "Soldier Support Center".....(804) 734-6606/6724/6985**
- Armed Forces Benefit Association.....1-800-776-2322**
- Army Emergency Relief (Bldg 9023).....(804) 734 -7954**
- Army and Air Force Mutual Aid Association.....1-800-522-5221**
- American Red Cross (Bldg 9023).....(804)- 734-6371**
- Chaplain (Bldg 10600).....(804) 734-6494**
- Civilian Personnel Office, Fort Lee.....(804) 765-4588**
- Hospital (Patient Administration).....(804) 734-9508**
- Legal Assistance (Bldg 1108).....(804) 765-1500**
- Military Benefit Association.....1-800-336-0100**
- Office of Personnel Management (Federal Retirees).....1-888-767-6738**

National Serviceman's Life Insurance (NSLI).....1-800-669-8477
Officers Benefit Association.....1-800-633-4632
Retired Pay Operations/Annuities1-800-321-1080
Veterans Group Life Insurance.....1-800-419-1473
Social Security Administration.....1-800-772-1213
Service Member's Life Insurance.....1-800-419-1473
Tricare Advisor (Fort Lee).....(804) 734-9447
Uniformed Services Benefit Association.....1-800-368-7021
Veterans Affairs.....1-800-827-1000
VA Headstones and Markers.....1-800-697-6947
Tax Assistance Center.....(804)734-5732
Survivor Outreach Services.....(804)734-6445/6446