

# Survivor Assistance Guide



## *Retiree Planning Guide* *September 2014*

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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](mailto:usarmy.lee.imcom.mbx.lee-ima-cas@mail.mil) for any comments referring to this guide. The national "retirement information" phone number is **866-335-2769**.

**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 decedents 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) 734-6606/6985/6724/6038**. 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**

**Navy – 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, the retiree's death certificate and discharge papers (DD214). 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, the retiree's death certificate and discharge papers (DD214).

**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.** The retiree's designated beneficiary or surviving family member may be authorized payment of the retiree's unpaid portion of retired pay. To apply, complete **SF 1174 (Claim for Unpaid Compensation of Deceased Member of the Uniformed Services)**.

**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, complete **DD Form 2656-7 (Verification for Survivor Annuity), a Direct Deposit Sign-up Form, and Form W4-P (Withholding Certificate for Annuity payments)**.

#### 1. Same-Sex Marriage SBP

On June 26, 2013, the U.S. Supreme Court determined certain parts of Defense of Marriage Act (DOMA) of 1996 were unconstitutional. As a result of this decision, the Federal Government now recognizes same-sex marriages which are legally performed under state law. On September 5, 2013, the Department of Defense (DoD) issued implementing guidance extending Survivor Benefit Plan (SBP) coverage to same-sex spouses of military members and retirees. In short, same-sex marriages that are valid in the state where performed will be recognized as valid for SBP purposes. The implementing guidance does not apply to civil unions or domestic partnerships. Several states now recognize same-sex marriages. It is the responsibility of the retiree to provide documentation of existence of valid marriage under applicable state law.

The DoD guidance generally provides that effective June 26, 2013, any person who is married to a same-sex partner may participate in the SBP in the same manner as any other married person. This includes the requirement for spousal concurrence for certain elections. The DoD guidance can be read in full at the following webpage <http://www.dfas.mil/retiredmilitary/provide/sbp/same-sex-sbp.html>.

Any claims to SBP spouse coverage for same-sex spouses of eligible participants of the SBP for periods before June 26, 2013, are not valid as the Defense of Marriage Act was still the law and in effect prior to June 26, 2013. As a result, no SBP premiums for such coverage will be charged prior to that date. Further, no SBP annuity payments for such coverage will be paid for deaths occurring before that date.

Effective from June 26, 2013, a person who becomes eligible to participate under 10 U.S.C. 1448 (a)(1) and is married to a same-sex partner shall have the SBP program applied as for any other married couple under section 10 U.S.C. 1448, including the requirements for spousal consent for less than full annuity coverage of the spouse.

A person who was married to a same-sex partner upon becoming eligible to participate in the plan prior to June 26, 2013, and who had married that same-sex partner before June 26, 2013, shall have one year from June 26, 2013, to make a spouse election under 10 U.S.C. 1448(a)(3). Such person may not participate at less than maximum coverage described in 10 U.S.C. 1448(a)(3) without the concurrence of the person's spouse unless they already had provided an annuity for a dependent child. If an election is not received on or before June 25, 2014, full spousal coverage shall be entered and the member shall be responsible for payment of premiums effective from June 26, 2013.

A person who is married to a same-sex partner on June 26, 2013 and has insurable interest coverage under the SBP may terminate the insurable interest coverage and elect spouse coverage. This election must be received on or before June 25, 2014.

A person who was not married upon becoming eligible to participate in the plan, but who married a same-sex partner before June 26, 2013, shall have one year from June 26, 2013, to make a spouse election under 10 U.S.C. 1448(a)(5). The election must be received on or before June 25, 2014, or the person shall be prohibited by law from making such election.

Generally, a person who is a participant in the plan and is providing coverage under the SBP for a spouse, who later does not have an eligible spouse beneficiary may, under 10 U.S.C. 1448(a)(6), elect not to provide coverage for a new spouse in the event of a remarriage.

For a person who enters into a same-sex marriage after June 26, 2013, the election to discontinue participation under 10 U.S.C. 1448(a)(6) must be made within one year of the remarriage. If a member does not discontinue participation, then pursuant to 10 U.S.C. 1448(a)(6), spouse coverage will resume effective on the first anniversary of the marriage.

If the remarriage took place prior to June 26, 2013, the participant has one year from June 26, 2013 to elect out of SBP. If a member does not make such an election within one year of June 26, 2013, then pursuant to section 10 U.S.C. 1448(a)(6), spouse coverage will resume effective no earlier than June 25, 2014.

Additionally, any such person falling within the parameters of section 10 U.S.C. 1448(g), shall have one year from June 26, 2013, or the date of any marriage subsequent to that date, to elect to increase the level of coverage under 10 U.S.C. 1448(g).

For additional information please click the link below:

<http://www.defense.gov/releases/release.aspx?releaseid=16203>

#### **4. Veterans Administration.**

Report the retiree's death to the Veteran's Administration at

**1-800-827-1000** and to inquire about survivor benefits. Some benefits that you may be eligible for are listed below. You can visit their website for additional information 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](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 (41A1), Department of Veterans Affairs, 5109 Russell Road, Quantico, VA 22132-3903 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 [mpps.headstones@va.gov](mailto:mpps.headstones@va.gov). (For more information regarding headstones and markers visit their website at [www.cem.va.gov](http://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 dated August 2014 (be sure to attach the retiree's DD214) and fax to **1-800-455-7143**. (For more information regarding a PMC visit the VA website [www.cem.va.gov](http://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 at the following website:

<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.

**NOTE:** *A state Veteran's Affairs Agent is usually available at Fort Lee on Wednesday from 9am-2:30pm at the Soldier Support Center, Bldg 3400, RSO, Room 107A. Contact 804-675-6546 to make an appointment or an agent can assist you at Hunter Holmes McGuire VA Medical Center 1201 Broad Rock Blvd, Richmond, VA 23224 in room 1M169A (M,W&F are all on a walk-in basis starting 8:00 A.M. and appointments are available on T&Th).*

### ***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 as of 12/01/2013 can be up to \$1,233.23 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 \$266.00 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.*

### ***Special Survivor Indemnity Allowance (SSIA)***

A provision of the National Defense Authorization Act Fiscal Year 2008, Public Law 110-181, established the SSIA benefit for surviving spouses who are the beneficiary of the Survivor Benefit Plan (SBP) and if their SBP annuity is partially or fully offset by their Dependency and Indemnity Compensation (DIC) payment, which is paid by Department of Veterans Affairs will receive an offset **IF**

- the surviving spouses of members who died on active duty whose SBP annuity is partially or fully offset by their DIC.

The SSIA starts at \$50 per month for fiscal year 2009 and then increases each fiscal year by \$10 until the SSIA is \$100 for fiscal years following 2013. SSIA will not be paid for months prior to October 2008 and will terminate February 2017.

The amount of the allowance paid to an eligible survivor are as follows below:

- fiscal year 2009, \$50
- fiscal year 2010, \$60
- fiscal year 2011, \$70
- fiscal year 2012, \$80
- fiscal year 2013, \$90
- fiscal year 2014, \$150
- fiscal year 2015, \$200
- fiscal year 2016, \$275
- fiscal year 2017, \$310

Surviving spouses whose SBP annuity is suspended due to remarriage prior to age 55 are not eligible for SSIA for the period their SBP annuity is suspended. If the marriage ends and the surviving spouse regains eligibility for SBP and DIC, they will also regain eligibility for SSIA. The SBP annuity for children is not offset by DIC. Therefore, child SBP beneficiaries are not authorized SSIA.

Surviving spouses whose SBP annuity is fully or partially offset by DIC are not required to apply for SSIA. The Defense Finance and Accounting Service – Cleveland (DFAS-CL) will automatically pay SSIA to Surviving spouses whose SBP accounts show a DIC offset of their spouse SBP annuity for months starting in October 2008. Letters will be sent to all surviving spouses who qualify to receive this benefit.

Surviving spouses not in receipt of this letter who believe they are entitled and have never applied for the SBP annuity benefit will not have an account to identify them as the SBP beneficiary eligible for payment of SSIA. These surviving spouses need to contact their Service representative for assistance with establishing their SBP annuity account. Account information and check address can be updated by contacting DFAS at 1-800-321-1080 for assistance. ***Please keep in remember that SSIA is a taxable benefit.***

The following examples below, show SBP coverage is \$2,500 which would provide an annuity of \$1,375 (55 percent of the base amount) and the 2009-2010 SSIA rate. It assumes that a claim for DIC was filed by the surviving spouse within one year after the member's death and DIC was approved by the VA.

SBP entitlement	\$1,375
Minus DIC entitlement	\$1,154
Net SBP payable	\$ 221
SSIA payable (FY2010)	\$ 60
Total payable after DIC	\$ 281

Note: The total of SBP and DIC is still equal to what SBP would have paid alone ( $\$221 + \$1,154 = \$1,375$ ); however, the DIC portion of the payment is not taxable as income. The spouse received a refund of SBP premiums deducted from retired pay except the cost that would have been paid to provide an SBP benefit of \$221, unless the member died on active duty.

**Example 2**

In the following example, the base amount selected for SBP coverage is \$1,500 which would provide an annuity of \$825 (55 percent of the base amount) and the 2009-2010 SSIA rate. It assumes that a claim for DIC was filed by the surviving spouse within one year after the member's death and DIC was approved by the VA.

SBP entitlement	\$ 825
Minus DIC entitlement	\$1,154
Net SBP payable	\$ 0
SSIA payable (FY2010)	\$ 60
Total payable after DIC	\$ 60

Note: The DIC entitlement is greater than the SBP payment. In this case, all spouse costs deducted from retired pay for SBP would be refunded to the surviving spouse, unless the member died on active duty.

***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.** VA will pay up to \$734 toward burial and funeral expenses and a \$734 plot-interment allowance for deaths on or after October 1, 2013. The plot-interment allowance is \$150 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 or 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/>.

## **5. Social Security.**

**S**ocial Security should be notified as soon as possible when a person dies. In most cases, the funeral director will report the person's death to Social Security. You will need to furnish the funeral director with the deceased's Social Security number so he or she can make the report.

Some of the deceased's family members may be able to receive Social Security benefits if the deceased person worked long enough under Social Security to qualify for benefits. **You should get in touch with Social Security as soon as you can to make sure the family receives all of the benefits to which it may be entitled.** Please read the following information carefully to learn what benefits may be available.

- A one-time payment of \$255 can be paid to the surviving spouse if he or she was living with the deceased; or, if living apart, was receiving certain Social Security benefits on the deceased's record. If there is no surviving spouse, the payment is made to a child who is eligible for benefits on the deceased's record in the month of death.
- Certain family members **may be eligible** to receive monthly benefits, including:
  - A widow or widower age 60 or older (age 50 or older if disabled);
  - A widow or widower at any age who is caring for the deceased's child under age 16 or disabled;
  - An unmarried child of the deceased who is:
    - Younger than age 18 (or up to age 19 if he or she is a full-time student in an elementary or secondary school); or
    - Age 18 or older with a disability that began before age 22;
  - A stepchild, grandchild, step grandchild or adopted child under certain circumstances;
  - Parents, age 62 or older, who were dependent on the deceased for at least half of their support; and
  - A surviving divorced spouse, under certain circumstances.

**If the deceased was receiving Social Security benefits**, you must return the benefit received for the month of death or any later months. For example, if the person dies in July, you must return the benefit paid in August. If benefits were paid by direct deposit, contact the bank or other financial institution. Request that any funds received for the month of death or later be returned to Social Security. If the benefits were paid by check, do not cash any checks received for the month in which the person dies or later. Return the checks to Social Security as soon as possible.

However, eligible family members may be able to receive death benefits for the month in which the beneficiary died.

## Survivors Planner: How Much Would Your Benefit Be?

Your survivor benefit amount would be based on the earnings of the person who died. The more he or she paid into Social Security, the higher your benefits would be. The monthly amount you would get is a percentage of the deceased's basic Social Security benefit. It depends on your age and the type of benefit you would be eligible to receive.

**Note:** If the person who died was receiving reduced benefits, we base your survivor's benefit on that amount. The **maximum** survivors benefit amount is limited to what he or she would receive if they were still alive.

These are examples of the benefits that survivors may receive:

- Widow or widower, [full retirement age](#) or older -- 100 percent of the deceased worker's benefit amount;
- Widow or widower, age 60 -- [full retirement age](#) -- 71½ to 99 percent of the deceased worker's basic amount;
- Disabled widow or widower aged 50 through 59 -- 71½ percent;
- Widow or widower, any age, caring for a child under age 16 -- 75 percent.
- A child under age 18 (19 if still in elementary or secondary school) or disabled -- 75 percent.
- Dependent parent(s) of the deceased worker, age 62 or older:
  - One surviving parent -- 82½ percent.
  - Two surviving parents -- 75 percent to each parent.

Percentages for a surviving divorced widow or widower would be the same as above.

There may also be [a special lump-sum death benefit](#).

### Maximum Family Amount

There's a limit to the amount that family members can receive each month. [The limit varies](#), but it is generally equal to about 150 to 180 percent of the basic benefit rate.

If the sum of the benefits payable to family members is greater than this limit, the benefits will be reduced proportionately. (Any benefits paid to a surviving divorced spouse based on disability or age won't count toward this maximum amount.)

### Contacting Social Security

For more information and to find copies of our publications, visit our website at [www.socialsecurity.gov](http://www.socialsecurity.gov) or call toll-free, **1-800-772-1213** (for the deaf or hard of hearing, call our TTY number, **1-800-325-0778**). We treat all calls confidentially. We can answer specific questions from 7 a.m. to 7 p.m., Monday through Friday. We can provide information by automated phone service 24 hours a day.

We also want to make sure you receive accurate and courteous service. That is why we have a second Social Security representative monitor some telephone calls.

**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.



**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 may 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**  
**Mon, Wed, Fri - 0800-1600**  
**(Appointment Only)**  
**Tues, Thurs – 0800-1200**  
**(Appointment Only)**  
**1300-1530 (Walk-In)**

**Charlottesville (Jag School)**

**(434) 971-3288 / 3300**  
**Mon-Fri – 0800-1200 / 1300-1700**

**Roanoke (Naval Reserve)**

**(540) 563-9723 / (540) 309-2563**  
**Tues, Thurs - 0800-1400**  
**(First Come First Served)**

**Richmond – DSCR**

**(804) 279-1020**  
**Mon-Fri - 0630-1630**  
**(First Come First Served)**

**Fort Pickett**

**(434) 292-2497**  
**Tues-Fri - 0700-1730**

**Fort A.P. Hill**

**(804) 633-8797**  
**Mon-Fri - 0800-1600**

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

**8. Funeral Honors.** The Fort Lee Casualty/Mortuary Affairs 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**  
**(Weekends/Holidays) – (757) 810-9499**

**Marine Corps – 1-866-826-3628**

**Navy – 1- 866- 203- 7791 – Option 1**

**Coast Guard – (757) 486-8605**

**9. 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.**

**10. 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.



# CASUALTY ASSISTANCE CHECKLIST

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

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

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Date of Retirement: \_\_\_\_\_ Retired grade/rank: \_\_\_\_\_

Enrolled in: RSFPP SBP SSBP (circle all that apply)

Did you disenroll from this plan? Yes No (circle one)

VA Claim #: \_\_\_\_\_

Eligible to draw VA disability compensation (even if not in receipt now): Yes No (circle one)

Receiving Social Security: Yes No (circle one) If yes, age at which first received: \_\_\_\_\_

Organ donor: Yes No (circle one)

Is there a living will? Yes No (circle one) If yes, where is it located:

\_\_\_\_\_

## SPOUSE INFORMATION:

Name	Date of Birth	SSN
------	---------------	-----

\_\_\_\_\_

## MARRIAGE INFORMATION:

Date of Marriage	Place of Marriage (City, State, Country)
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\_\_\_\_\_

## CHILDREN INFORMATION:

Name	Address	Age	Phone number
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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**INSURANCE POLICIES:**

Policy #	Company	Amount	Agent phone #
_____	_____	_____	_____
_____	_____	_____	_____

**INVESTMENTS:**

Type (IRA, CD, Mutual Fund)	Company	Amount	Agent phone #
_____	_____	_____	_____

**BANK ACCOUNTS:**

Bank Name	Phone #	Type of Acct (Checking/Saving)	Amount	Account #
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**BILLS:**

Name	Address	Phone#	Account#	Balance Due
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**BURIAL INFORMATION:**

**Who should be notified of your death?**

Name	Relationship	Address	Phone#
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Do you want to be:**    Buried    Cremated?    (Circle one)

**Name of cemetery where you want to be buried:** \_\_\_\_\_

\_\_\_\_\_

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

**Do you want a memorial service?**    YES    NO

If yes, where? \_\_\_\_\_

**Have you purchased a burial plot?**    YES    NO

If yes, where? \_\_\_\_\_

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

If yes, which one? \_\_\_\_\_

**Do you want a military funeral honors team?**    YES    NO





**LOCATION OF DOCUMENTS**

**DOCUMENT**

**LOCATION**

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

**Current Retired Pay statement:** \_\_\_\_\_

**Marriage Certificate(s):** \_\_\_\_\_

**Birth Certificate(s):** \_\_\_\_\_

**Discharge record(s):** \_\_\_\_\_

**Divorce Decree(s):** \_\_\_\_\_

**Death Certificate(s):** \_\_\_\_\_

**Insurance Policy(s):** \_\_\_\_\_

**Investment Paper (s):** \_\_\_\_\_

**Real Estate Deed(s):** \_\_\_\_\_

**Medical Records:** \_\_\_\_\_

**Dental Records:** \_\_\_\_\_

**Vehicle Registration:** \_\_\_\_\_

**Vehicle Title:** \_\_\_\_\_

**Burial Plot Information:** \_\_\_\_\_

**Uniform/Burial Clothing:** \_\_\_\_\_

**Tax Returns:** \_\_\_\_\_

**Safe Deposit Box:** \_\_\_\_\_

## SURVIVOR OF DECEASED RETIREE CHECKLIST

- \_\_\_\_\_ **DFAS:** Contact DFAS at **1-800-321-1080** to report retiree's death. They can answer any questions you may have about the retired pay.
- \_\_\_\_\_ **Unpaid Pay and Allowances:** The designated beneficiary or spouse is authorized payment of retired pay from the 1st of the month through the day of death. Fill out SF 1174 and fax to 1-800-469-6559 or mail to: DFAS –Retired Pay, P.O. Box 7130, London, KY 40742. Include copy of death certificate.
- \_\_\_\_\_ **Survivor Benefit Plan Annuity:** If the retiree participated in the SBP, an annuity is payable to authorized dependents. Fill out DD 2656-7, Verification for Survivor Annuity, SF 1199A, Direct Deposit Authorization, Form W-4 and fax to: 1-800-982-8459 or mail to: DFAS – Annuitant Pay, P.O. Box 7131, London, KY 40742. Include copy of death certificate. Their phone is **(1-800-321-1080)**.
- \_\_\_\_\_ **Social Security:** Contact the Social Security Administration to report the retiree's death. You may be eligible for benefits; you must apply in order to receive benefits. Contact the Social Security Office at **(1-800-772-1213)**. They will schedule an appointment for you. On the date of your appointment you may want to arrange to have someone available to assist you. For additional information visit their website at: [www.ssa.gov](http://www.ssa.gov)
- \_\_\_\_\_ **Veterans Administration:** Contact the Department of Veterans Affairs to report the retiree's death. You may be eligible for benefits. The Department of Veterans Affairs is available to answer questions about Veterans Affairs benefits at their nationwide toll-free telephone number, **(1-800-827-1000)**, (Hearing Impaired may call, **(1-800-829-4833)**). For additional information visit their website at: [www.va.gov](http://www.va.gov)
- \_\_\_\_\_ **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 (41A1), Department of Veterans Affairs, 5109 Russell Road, Quantico, VA 22132-3903 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](mailto:mps.headstones@va.gov). (For more information regarding headstones and markers visit their website at [www.cem.va.gov](http://www.cem.va.gov)).
- \_\_\_\_\_ **Life Insurance:** Gather all insurance policies, check safe deposit boxes, files or papers kept by the retiree. Civilian insurance policies should have a company or an agent to contact. Contact the company or agent, report the retiree's death and ask for instruction on how to apply for the benefit. Government Insurance is listed below:
- \_\_\_\_\_ **Veterans Group Life Insurance (VGLI):** Insurance retiree can select to continue after retirement. To report death or check if retiree was insured, call **1-800-419-1473** or write to Office of Serviceman's Group Life Insurance (OSGLI), 213 Washington St., Newark, NJ 07102. If the policy number is unknown, provide the veteran's social security number and date of birth/death. If retiree was insured they will provide an application for benefits to you. Fill out the application and return with a copy of the retiree's death certificate.

\_\_\_\_\_ **Veterans Administration (VA) Insurance:** Insurance contracted through the VA Insurance Center, (disabled retirees). To report death or check if retiree was insured, call **1-800-669-8477** or write to Department of Veteran Affairs, Regional Office and Insurance Center, Box 42954, Philadelphia, PA 19101. If the policy number is unknown, provide the veteran's VA file number, social security number, date of birth, military serial number or military service branch and dates of service. If retiree was insured they will provide and application for benefits to you. Fill out the application and return with a copy of the retiree's death certificate.

\_\_\_\_\_ **ID Card:** Contact the ID card Section at Fort Lee (734-7394) to update your ID card or Nearest DEERS remote site.

\_\_\_\_\_ **Financial Assistance:** To meet a financial emergency, the survivor may receive assistance from the Army Emergency Relief. Bldg 9023 (734-7954).

\_\_\_\_\_ **TRICARE:** Eligible. A new ID Card and DEERS enrollment is necessary. Consult a TRICARE Benefits Advisor or PAD or nearest military treatment facility for details and premium rates. TRICARE is lost if spouse remarries. For further of nearest military medical treatment information visit: <http://www.tricare.mil/> or call: **1-800-931-9501**.

\_\_\_\_\_ **MEDICARE:** Eligible at age 65. Spouse/handicapped children may be eligible. Medicare-eligible military beneficiaries become eligible for all other Tricare benefits effective Oct 1, 2001. The law requires that all Medicare-eligible beneficiaries, no matter when they turned 65, must be enrolled in Medicare Part B to receive the rest of the Tricare benefits. For further information Contact the Social Security Administration at: **1-800-772-1213** or Call Medicare at: **1-800-633-4227** or visit the Medicare website at: <http://www.medicare.gov/>



## 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.

<b>Fort Lee Casualty Office (Bldg 3400) "Soldier Support Center"</b> .....	<b>(804) 734-6606</b>
<b>Armed Forces Benefit Association</b> .....	<b>1-800-776-2322</b>
<b>Army Emergency Relief (Bldg 9023)</b> .....	<b>(804) 734 -7954</b>
<b>Army and Air Force Mutual Aid Association</b> .....	<b>1-800-522-5221</b>
<b>American Red Cross (Bldg 9023)</b> .....	<b>(804)- 734-6371</b>
<b>Chaplain (Bldg 10600)</b> .....	<b>(804) 734-6494</b>
<b>Civilian Personnel Office, Fort Lee</b> .....	<b>(804) 765-4588</b>
<b>Hospital (Patient Administration)</b> .....	<b>(804) 734-9508</b>
<b>Legal Assistance (Bldg 1108)</b> .....	<b>(804) 765-1500</b>
<b>Military Benefit Association</b> .....	<b>1-800-336-0100</b>
<b>Office of Personnel Management (Federal Retirees)</b> .....	<b>1-888-767-6738</b>
<b>National Serviceman's Life Insurance (NSLI)</b> .....	<b>1-800-669-8477</b>
<b>Officers Benefit Association</b> .....	<b>1-800-633-4632</b>
<b>Retired Pay Operations/Annuities</b> .....	<b>1-800-321-1080</b>
<b>Veterans Group Life Insurance</b> .....	<b>1-800-419-1473</b>
<b>Social Security Administration</b> .....	<b>1-800-772-1213</b>
<b>Service Member's Life Insurance</b> .....	<b>1-800-419-1473</b>
<b>Tricare Advisor (Fort Lee)</b> .....	<b>(804) 734-9447</b>
<b>Uniformed Services Benefit Association</b> .....	<b>1-800-368-7021</b>
<b>Veterans Affairs</b> .....	<b>1-800-827-1000</b>
<b>VA Headstones and Markers</b> .....	<b>1-800-697-6947</b>
<b>Tax Assistance Center</b> .....	<b>(804)734-5732</b>
<b>Survivor Outreach Services</b> .....	<b>(804)734-6445/6446</b>