

DEVELOPED PRIMARILY FOR USE BY RETIREES OF ALL THE ARMED FORCES  
**“RETIREES CASUALTY ASSISTANCE CHECKLIST”**  
 (For later use by next of kin)

As of Date:

Retirees Name	SSN	Ser# (Other)
(First) (Middle) (Last)		
Military Grade	Date of Retirement	Branch of Svc. Yrs. of Svc.
Address	City State Zip	
Date of Birth	Place of Birth	
Month Day Year		
Date of Marriage	Place of Marriage	
Month Day Year		
Father's Name	DOB	Place of Birth
	Month Day Year	
Mother's Maiden Name	DOB	Place of Birth
	Month Day Year	

**Documents needed to claim death benefits:**

- Copies of report(s) of separation from active duty (DD Form 214, etc.)
- Copy of retirement orders
- Copies of birth and death certificates
- Beneficiaries birth certificate(s) and marriage and/or divorce data
- Social Security data (see below)
- VA Insurance data (see below)

} Location of these Documents:

**Plus- You should always have the following documents on ha**

- Updated Will and "LETTER OF INSTRUCTIONS"
- Names of banks, credit unions, etc. (account numbers)
- Updated lists of assets and liabilities
- Insurance policies, numbers, instructions, payments, etc.
- Adoption or naturalization papers (if applicable)

} Note:  
See "Letter of Instructions" for location of other documents.

**Part I – Veterans Administration Data (if applicable)**

VA Compensation \$	Disability Claim #	Remarks
VA Insurance Policy nr(s)	/	File #
Type	Amount \$ /	Location of Policies
Any known paid-up-add'l VA Insurance \$		As of date
Other remarks		
Veteran's claim nr(s) (other)		Patients data card #

**Part II – Retirement Pay Data (see Retiree Account Statements)**

Retiree gross and net pay data: as of date

Gross pay	\$			
Deduction	\$	For	Deduction	\$ For
Deduction	\$	For	Deduction	\$ For
Deduction	\$	For	Deduction	\$ For
Net pay	\$		Taxable income	\$

Survivor coverage information (coverage type: spouse only, etc.): Monthly Cost: \$

Survivor Benefit Plan Annuity:

55% annuity amount \$

35% annuity amount \$

RSFPP Annuity: \$

Supplemental SBP: \$

Annuity Base Amount: \$

Note: See "Retiree Account Statement" for explanation of Social Security Offset/2-tier Formula

Effective

### Part III – Social Security (when applicable)

Social Security Claim #

Month Filed

Type of Benefit(s)

Beginning month of entitlement

Amount monthly \$

Bank and acct. # (direct deposit)

Note: No payment is payable for the month of death (call 1-800-772-1213)

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

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

Info required for Death Certificate (date/place of birth, father's name, mother's maiden name. etc.)

Info required for Obituary Notice (names, relation and locations of appropriate relatives, etc.)

Widows will need a new ID card (military, medical, commissary, base exchange, etc.)

Necessary changes in your "DEERS" program will have to be made

It may take several months to clear estates (you may require at least 8 copies of death certificates)

Contents of your safety deposit box should be known

Direct deposit of Social Security benefits & 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 (headstone, payments, etc.)

Check 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 cancelled

Appropriate changes should be made to all joint ownerships

Contact insurance companies as appropriate

Be prepared to turn in Retirees ID card (where and when required)

**Note:**  
MAKE EVERY EFFORT  
to retain "Original"  
documents (Provide  
Certified copies whenever  
possible).

Fill in and keep handy the following office phone numbers:

Office/Organization

Phone Number

Casualty Assistance

Retiree Activities Office

Hospital

Legal Office (Military)

VA Hotline

1-800-827-1000

Social Security Hotline

1-800-772-1213

DEERS (Information)

Other

Finance (DFAS – Cleveland)

SBP (Annuity Pay Info)

Other Pass & ID

**OTHER IMPORTANT NUMBERS**

Organization

Local and 800#

Mortuary Affairs

American Red Cross

Family Support Center

VA Insurance Center

1-800-669-8477

USAF Mil Pers Ctr

1-800-531-7502

Army Retired Services

1-800-360-4909

USMC Retiree Affairs

1-800-336-4649

USCG Pay & Pay Center

1-800-712-8724

Navy Retired Activities

1-800-255-8950

Note: Spouse/Next of Kin should have a copy of this document or know where to locate it.