

Retirees Casualty Assistance Checklist

As of date:

Retirees Name	SSAN	Military Grade	Branch of Service
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Date of Retirement	Years of Service	Place of Birth	Date of Birth
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Address

City	State	Zip Code
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Spouse Name	Spouse Maiden Name	Date of Birth
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Place of Birth	Date of Marriage	Place of Marriage
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Parents Information

Father's Name	Date of Birth	Place of Birth
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Mother's Name and (Maiden Name)	Date of Birth	Place of Birth
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Documents needed to claim death benefits (Check them off and note location of each)

Copies of report(s) of separation from active duty (DD Form 214, etc.):

Copies of retirement orders:

Copies of birth and death certificates:

Beneficiaries birth certificate(s) and marriage and/or divorce data:

Social Security data (see Part III):

VA insurance data (see Part I):

Plus - You should always have the following documents on hand (note location of each)

Updated will and letter of instructions:	
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Location of Safe deposit box and key	
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Names of banks, credit unions, etc and account numbers:	
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Insurance policies, numbers, instructions, payments, etc:	
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Updated list of assets and liabilities:	
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Adoption or naturalization papers (if applicable):	
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Part 1 – Veterans Affairs Data (if applicable)

Disability claim#

Remarks:

VA Insurance policy Nr(s):

File Nr:

Type

Amount \$

Location of policies

Any know paid-up additional VA insurance \$

As of Date

Other Remarks:

Patients Data Card#

Part II – Retirement Pay Data (See Retiree Account Statement – RAS)

Retiree pay data as of date:

Gross Pay \$

Deduction \$

For

Deduction \$

For

Deduction \$

For

Net Pay \$

Taxable Income \$

Survivor coverage information

Survivor Benefit Plan annuity \$

SBP Base Amount \$

Supplemental SBP (if any) \$

Effective

RSFPP annuity \$

Part III – Social Security (when applicable)

Social Security Claim #	Month Filed
Type of benefit(s)	Beginning month of entitlement
Amount monthly \$	Bank and Account # (direct deposit)
Note: No payment is payable for the month of death (call local SSA office)	

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

- Disposition instructions for the body (burial, cremation, memorial service, etc.)
- Information required for Death Certification. (Date/Place of birth, Father's Name, Mother's Maiden Name, Education Level, Occupation, etc)
- Information required for obituary notice (names, relation & locations of appropriate relatives, etc)
- Widows will need a new dependent ID card (military, medical, commissary, base exchange, etc)
- Necessary changes in your DEERS program will have to be made (TRICARE, etc)
- It may take several months to clear estates (you may require at least 8 copies of death certificate)
- Contents of your safety deposit box should be know (and make sure the box number, its location and location of key are 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)
- 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 canceled
- Appropriate changes should be made to all joint ownerships
- Contact insurance companies as appropriate
- Be prepared to turn in Retirees ID Card

Note: Make every effort to retain "original" documents (Provide certified copies whenever possible)

Note: Spouse/Next of Kin should have a copy of this document or know where to locate it. Consider letting a third party (family member) know where it is in case something should happen to both the retiree and spouse or Next of Kin at the same time.

Revised Feb 2004 by Harold Williams
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Casualty Assistance Representative (CAR) Information	CAR Grade, Name and Telephone Number:		
	Military Mailing Address:		
(Unit, Installation, State, ZIP Code, Bldg/Room Number)			
Office Hours:			
Mortuary Services		Chaplain:	
Family Support Center (FSC)			
Air Force Aid Society (AFAS)		American Red Cross (ARC)	
Legal Assistance Officer			
Health Benefits Advisor		Transportation Management Office (TMO)	
	Defense Finance and Accounting Service Cleveland Center (DFAS-CL):		
	1-800-321-1080 or 1-800-269-5170 (Toll Free Telephone Number)		
Local County Department of Veterans Affairs (VA) Office			
	Defense Finance and Accounting Service Denver Center (DFAS-DE):		
	1-800-435-3396 (Toll Free Telephone Number)		
VA (Benefits)		VA (Life Insurance)	
1-800-827-1000 (Toll Free Telephone Number)		1-800-669-8477 (Toll Free Telephone Number)	
Local Social Security Administration		Social Security Nationwide Office	
		1-800-772-1213 (Toll Free Telephone Number)	