

Checklist for Deceased Military Retirees

This checklist applies to the affairs of military retirees or their survivors who resided in the Puget Sound region of Washington State at the time of the retiree's death. Not all items will apply, but you should consider each item to determine if it needs attention.

First Contacts

These are important calls you should make first

➤ **Military Retiree Pension**

Retirement pay stops on the day of the retiree's death. Inform the Defense Finance & Accounting Service (DFAS) of the death.

Call 800-321-1080, option 1

Have the following information available:

For the deceased retiree: Name, SSN, date of death

For the caller: Name, address, telephone number, and relationship to the deceased

When notified, DFAS will stop monthly payments to minimize overpayment.

Within 7-10 business days after reporting the death to DFAS, you should receive a letter containing the following documents:

- SF1174 Claim for Unpaid Compensation of Deceased Member of the Uniformed Service
- Annuity account forms & instructions (if the deceased was enrolled in the Survivor Benefit Plan or the Retired Serviceman's Family Protection Plan)

For online assistance completing forms, enter "DFAS Home" in your browser (for example: Chrome, Safari, Firefox, etc.). Open "Retired Military & Annuitants" in a new tab, and scan the list of tools for the desired forms and instructions. Always open these in new tabs for ease of use (use the right button on your mouse and select "open in a new tab").

➤ Social Security

Social Security payments will be issued up to the month prior to the month an individual dies. Even if a funeral home informs the Social Security Administration of the death, a survivor should call **800-772-1213** or visit the nearest office to ensure all benefits are claimed and to close out the SSN of the deceased. Be prepared to provide SSNs, names, and dates of birth. For online services, go to ssa.gov; click on "Online Services."

➤ Veterans Affairs

If the deceased was receiving payments authorized by the Department of Veterans Affairs (e.g. for disability compensation or a pension), you must report the death by calling **800-827-1000**. When prompted, say "report a death." Have available the veteran's name, SSN, and date of birth.

For questions regarding eligibility or claims for VA benefits, call as just described. For online information about VA burial benefits and memorial items, go to

va.gov/burials-memorials

For Veterans Group Life Insurance claims call 800-669-8477; online at benefits.va.gov

➤ Civil Service Pension or Annuity

If the deceased was a Civil Service retiree or receiving an annuity, notify the Office of Personal Management (OPM): Call **888-767-6738** (for best results, call very early or very late in the day) or email retire@opm.gov (recommended). Be prepared to provide an OPM Retirement Claim Number or SSN of the deceased.

The OPM retirement website: www.opm.gov/retirement-services/

➤ Private Pensions

If the deceased received funds from a private employer-sponsored plan, or from investments, notify the fund administrator or retirement custodian.

Institution: _____ Phone: _____

Account no.: _____ Type of Account: _____

➤ Life Insurance

If the deceased had current life insurance, contact the insurer(s).

Insurer: _____ Phone: _____

Policy #: _____ Face amount: \$ _____

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Policy #: _____ Face amount: \$ _____

➤ Thrift Savings Plan

If the deceased participated in the federal government's Thrift Savings Plan (TSP), contact the Federal Retirement Thrift Board at **877-968-3778, option 3**. If you or the deceased do not have a specific TSP user ID, please go to tsp.gov to create one. *They do not utilize SSNs as identifiers!* You may also sign-in to the account at this address if you have happen to already have your TSP User ID.

➤ Legal Matters

Inform the attorney, trust administrator, and/or executor of the estate.

Next Steps

These contacts are less important, but should be addressed soon.

➤ Financial Institutions

Notify the banks, brokers, & investment firms where the deceased saved, invested, and/or maintained funds. Locate all savings & checking accounts, CDs, IRAs, stocks, bonds, and securities. For each account have the following information: institution name, its telephone number, account number, and the name(s) on the account.

➤ Auto, Home, Medical, Property, & Other Insurance

Contact the insurer(s) to stop or transfer insurance coverage. If possible, have the applicable policy for reference during the phone call.

➤ Accountant

If the deceased had an accountant or tax preparer, inform them of the death. Perhaps they can assist with financial matters.

➤ Loans & Credit Cards

Review loan & credit card statements for balances & periodic payments. Update contact information for holders of debt accounts. Contact each periodic payment payee to cancel, confirm, and/or adjust future payments. For each account, have the institution name, its telephone number, account number, the name on the account, and balance due.

➤ Taxes

Contact municipal and county tax offices. Veterans who reside in Washington and retired because of a disability; veterans with a 100 percent service-connected disability; and widows of 100% disabled veterans may qualify for income-based property tax exemptions and deferrals. To find out if you qualify, contact your County Assessor.

For more information: <https://militarybenefits.info/washington-veterans-benefits/#ixzz6pJknGwBa>

➤ Military-related Health Care Providers

If the deceased has received bills for health care, the survivor should contact the retiree's primary health care provider:

TRICARE for Life (65 and older)	866-773-0404	www.tricare4u.com
TRICARE West Region (under 65)	844-866-9378	www.tricare.mil/WEST
FEDVIP (dental/vision) [BENEFEDS]	877-888-FEDS	www.benefeds.com

➤ Identification Cards (ID Cards)

Return the ID card of the deceased, with a certified death certificate, to an ID card issuing office.

Surviving spouses, to show eligibility for medical benefits, must ensure they have an unexpired ID card and have updated the DEERS database.

The following offices issue ID cards and update DEERS **for all military branches**.

Call ahead to make an appointment and to determine hours & required documents.

Armed Forces Reserve Center	Marysville	719-366-7423
Naval Station Everett PSD ID	Everett	425-304-4256
Joint Base Lewis-McChord	JBLM	253-982-2855
NAS Whidbey Island	Oak Harbor	360-257-6070
Naval Base Kitsap	Bangor	360-396-5732
USCG Base Seattle	Seattle	206-217-6504

For other ID card offices, see:

<http://idco.dmdc.osd.mil/idco/locator>

➤ Military Funeral Honors

If the family desires military funeral honors, the funeral home may be able to accommodate those arrangements.

Funeral Honors may also be requested through Navy Region Northwest by submitting a Funeral Honors Request Form and a DD Form 214 to **navyfuneralhonorsnw@us.navy.mil**. More information and Form available online at <http://cnic.navy.mil/Operations-and-Management/Base-Support/Command-and-Staff/Casualty-Assistance/Funeral-Honors> or by calling **360-315-3275**.

➤ Military Records

To request all or part of the deceased retiree's military record, such as a DD Form 214 or medical records, you may request copies online at

<http://www.archives.gov/veterans/military-service-records>

or complete and mail a Standard Form 180 (SF-180). To obtain an SF-180 Form, call the Retired Activities Office or download online at

<http://www.archives.gov/research/order/standard-form-180.pdf>

Assistance Resources

Retired Activity Offices (RAO)

Information & assistance regarding rights, privileges, and benefits from the military services. **Each office serves retirees and survivors from all military branches.** Call ahead for hours of operation.

<u>Location</u>	<u>Phone</u>
Naval Station Everett (Smokey Point complex)	425-304-3775
NAS Whidbey Island	360-257-8054
Naval Base Kitsap	866-854-0638
Retirement Services Office (Army), JBLM	253-966-5884
Retiree Activities Office (USAF), McChord Field	253-982-3214

Department of Veterans Affairs - Vet Centers

Provides individual counseling for Veterans and their families, as well as explanation of VA benefits and referrals. Call ahead for hours of operation.

<u>Location</u>	<u>Phone</u>
Everett Vet Center	425-252-9701
Seattle Vet Center	206-764-5130
Bellingham Vet Center	360-733-9226

Fraternal Groups

Many associations assist survivors of their members; for example, the Fleet Reserve Association (FRA), the Military Officers Association of America (MOAA), The Retired Enlisted Association (TREA), Veterans of Foreign Wars (VFW), The American Legion, and Disabled American Veterans (DAV). Contact information is usually available on each association's website.