

For Further Assistance

If you have other questions regarding this checklist, contact MOAA's Benefits Information Department at 1-800-234-6622 or send an e-mail to beninfo@moaa.org.

MOAA
INFO EXCHANGESM

Auxiliary Checklist



A PUBLICATION OF MILITARY OFFICERS ASSOCIATION OF AMERICA



Military Officers Association of America
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Dealing with the Loss of a Loved One

When a family member dies, the last thing on your mind is taxes and notifying pension plan administrators. But even as you grieve, it's essential that you begin taking steps to tie up the affairs of your loved one. Keep this checklist on hand to refer to when dealing with the death in the family. While not exhaustive, this list is intended as reminder for family members and surviving spouses about the many subjects that need attention at the time of death of a MOAA member.

Some associations offer spouse assistance to their members and will notify many of the places listed on this checklist, including:

Military Officers Association of America
1-800-234-6622
<http://www.moaa.org>

Army and Air Force Mutual Aid Association:
1-800-336-4538 or 703-522-3060
<http://www.aafmaa.com>

Navy Mutual Aid Association:
1-800-628-6011 or 703-614-1638
<http://www.nmaa.org>

Contact these organizations if you need help during this time of need.

If you live in close proximity to a military installation and would like assistance with military administrative matters, see if the location has a Casualty Assistance Officer, Retirement Service Officer or Retired Affairs Office for additional guidance.

Who to Contact

These are the important calls you need to make first. Check off each call as you go and make any notes of your conversations, including the date on which you called.

SBP/RSFPP

To stop the monthly SBP annuity, notify the appropriate service office of the death of the surviving spouse.

- *Army, Marine Corps, Navy and Air Force:*
Tel: 1-800-321-1080
- *U.S. Coast Guard and NOAA:*
Tel: 1-800-772-8724
Fax: 785-339-3770
- *U.S. Public Health Service:*
Tel: 1-800-638-8744

Notes:

Veterans Affairs

• If the widow was awarded Dependency and Indemnity Compensation or received other income from the Department of Veterans Affairs (VA), contact the nearest VA Regional Office to stop those payments by calling 1-800-827-1000.

Notes:

Lawyer/Estate Executor

Contact your lawyer, trust administrator, or the executor of the estate.

Notes:

Social Security

Notify the Social Security Administration at 1-800-772-1213 (Social Security survivor benefits and death benefit).

Notes:

Life Insurance

If the deceased had current life insurance, contact the company or companies. Be prepared to provide policy numbers and copy of a death certificate.

Notes:

Civil Service

If the deceased was an annuitant of the Civil Service or Federal Employee Retirement System (CSRS or FERS), notify the Office of Personnel Management at 724-794-2005 (Civil Service SBP, Casualty and Federal Group Life Insurance inquiries), or call toll-free 1-888-767-6738.

Notes:

Thrift Savings Plan

If the deceased was a CSRS or FERS retiree and participated in the Thrift Savings Plan, contact the Federal Retirement Thrift Investment Board at 1-877-968-3778.

Notes:

Private Pensions

If the deceased also qualified for a retirement plan or pension from a private sector employer, notify that employer or pension plan administrator.

Notes:

Investments

Notify any financial institution including banks, brokerage houses and investment firms that have an individual or joint account in the name of the deceased. Remember to locate all stocks, bonds and securities. Have account numbers available, if known.

Notes:

NEXT STEPS

Items in this section are not as time sensitive as those on the previous pages.

- Credit card companies or other charge accounts
Have account numbers available, if known.

Notes:

- Accountant/CPA or tax preparer

Notes:

- Other insurance companies (health, property, automobile, mortgage, Medigap, TRICARE insurance supplement, etc.)

Have policy numbers on hand, if known.

Notes:

- State Department of Motor Vehicles (DMV)

Notes:

- City, County, and State property offices

Notes:

- Any fraternal or professional organizations such as AARP, American Legion, Disabled American Veterans, Veterans of Foreign Wars, Gold Star Wives, etc.

- American Association of Retired Persons:

<http://www.aarp.org>

- American Legion:

<http://www.legion.org>

- Disabled American Veterans:

<http://www.dav.org>

- Veterans of Foreign Wars:

<http://www.vfw.org>

- Gold Star Wives:

<http://www.goldstarwives.org>

Notes:

- Automobile leasing agent

Notes: