**Military Retiree Checklist**

**Create a file consisting of the following and the location of any referenced forms to assist you & your Benefits Counselor in obtaining benefits from the Social Security Administration, Veterans Affairs, National Personnel Records Center, Defense Finance Accounting Service for: *(Fill in the blanks)***

**Rank \_\_\_\_\_\_\_ Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Branch U.S. \_\_\_\_\_\_\_\_\_\_**

**SSAN \_\_\_\_\_\_\_ - \_\_\_\_ - \_\_\_\_\_\_\_ DOB \_\_\_\_ /\_\_\_\_ /\_\_\_\_\_\_\_**

**Spouse \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Next of Kin (a) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, (b) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(1) Military Retirement File**

**a. Retirement Orders (Normally paper orders issued just prior to your retirement date.)**

**b. DD 214 and/or DD 215 (DD 214 is the document outlining service, DD 215 is a document to correct an error on the original DD 214 (Often these are filed at the county clerk’s office of the home of record of the military retiree upon discharge from his or her service.)**

**c. Separation Papers (if applicable)**

**d. Military I. D. Cards (at age 65 both cards become indefinite)**

**e. Birth Certificates (Member & Spouse)**

**f. Medical & Dental Records (Maintained by the military retiree & the Department of Veterans Affairs.**

**g. Claim # for pending VA Claims \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Fill in the blank)* (Call 800-321-1000 & explain your situation.)**

**h. Retiree Account Statement showing a list of deductions ie. Taxes, Allotments, etc. @ <https://mypay.dfas.mil> (Will require the military retirees username & password)**

**i Name, relationship, address of beneficiaries of unpaid retired pay at the time of death. (Listed on the Retiree Account Statement.)**

**j. Address and Phone # for DFAS:**

 ***Defense Finance Accounting Service***

 ***U.S. Military Retirement Pay***

 ***8899 E. 56th Street***

 ***Indianapolis, IN 46249-1200***

 ***(800) 321-1080* *(Press option #3 to report deceased military retirees)***

 **Note: Notifying DFAS as soon as possible may avoid any over payment of retiree pay.**

 **k. Survivor Benefit Program (SBP) -Additional info about SBP can be obtained by calling DFAS**

**@ (800) 321-1080 (If applicable)**

 **l. Reserve Component Survivor Benefit Plan (RCSBP) (If applicable)**

 **m. Retired Serviceman’s Family Protection Plan (RSFPP) (If applicable)**

 **n. Civil Service Annuity (If applicable)**

 **o. Marriage Certificate/Records (To include all marriages)**

 **p. Divorce Decrees (To include all divorces)**

 **q. Adoptions and Naturalizations Papers (If applicable)**

 **r. State and Federal Income Taxes (Past 8 years)**

**s. Property Tax Bills Note: Some states allow for tax exemption to spouses of 100% Service Connected Disabled military retirees that can be transferred to the surviving spouse.)**

 **t. Deeds and any other related information.**

 **u. Life Insurance Policy – (Notify all insurance companies)**

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 **v. Property, Accident, Liability Insurance – (Notify all insurance companies)**

 **w. Hospitalization/Medical Insurance – (Notify all insurance companies)**

**x. Bank Checking/Savings/Credit Union Accounts (Advise financial institutions to change the names on the accounts after all bills are paid and liquidations of accounts are made.**

 **y. Deposit Boxes Locations – Notify Bank**

 **z. Savings Bond Information – Cash or transfer balance on all Savings Bonds**

**aa. Stocks, Bonds, and Securities owned ie. Investment Records**

 **bb. Credit Card Account Numbers and Mailing Addresses of Creditors**

 **cc. Association Listing and Membership Information; provide a listing of**

 **dd. Friends and Business Associates including addresses and phone numbers; helps in identifying friends**

 **ee. Discuss burial wishes with next of kin to include:**

 **(1) Cemetery Location: (a) National Cemetery Scheduling Office 1-800-535-1117 or**

 **(b) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Fill in the blank)***

 **(2) Burial Wishes: (a) To be buried, (b) To be cremated, (c) To be buried at sea, etc. *(Circle One*)**

 **(3) Apply for a Pre-Need Determination of Eligibility for Burial in a VA National Cemetery using**

 **\*VA Form 40-10007 found at [www.va.gov/vaforms/search\_action.asp](http://www.va.gov/vaforms/search_action.asp)**

**(4) Desire to be buried in uniform? Yes No *(Circle One)***

**(5) Desire to have a Memorial Service? Yes No *(Circle One)***

**(6) Desire a Military Honor Guard Yes No *(Circle One)***

**(7) Have I prepared an Obituary? Yes No *(Circle One)***

**Note: Many states have specific laws & guidelines regulating cremation & burials at sea. Some require a letter of authority signed by the deceased in order to authorize a cremation. Know the laws that affect your decisions. Information concerning Burials at Sea can be obtained by phoning Navy Mortuary Affairs at (866) 787-0081.**

**(8) Have a Last Will & Testament drawn up outlining your specifics.**

**ff. Notify the following in the event of retirees death.**

**(1) Defense Finance & Accounting Service (DFAS) , Indianapolis, In 46249-1200 - (800) 321-1080**

 **(2) Social Security Administration (for death benefits) (800) 772-1213**

**(a) You can also make application for the Lump-sum Death Payment from Social Security in the amount of $255 at this time using \*SSA-8 Form found at [www.va.gov/vaforms/search\_action.asp](http://www.va.gov/vaforms/search_action.asp)**

**(3) Department of Veterans Affairs – (800) 827-1000**

 **(4) Office of Personnel Management (OPM) (724) 794-8690**

 **(5) Any Fraternal Group you are a member of:**

**MOAA (800) 234-6622 [www.moaa.org](http://www.moaa.org)**

**FRA (800) 372-1924 [www.fra.org](http://www.fra.org)**

**NCOA (210) 653-6161 [www.ncoa.org](http://www.ncoa.org)**

**VFW (816) 756-3390 [www.vfw.org](http://www.vfw.org)**

**American Legion (800) 433-3318 [www.legion.org](http://www.legion.org)**

**TREA (303) 752-0660 [www.trea.org](http://www.trea.org)**

**Texas Veterans Comm. (800) 252-8387 [www.tvc.texas.gov](http://www.tvc.texas.gov)**

 **(6) Any previous employers that provide pension or benefits.**

**gg. Vehicle(s) Registration and Titles Note: It is easier to have both the name of spouse and military retiree on the titles so that the survivor does not have to pay fees for transferring the title.**

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**hh. VA & NAS JRB Phone Numbers**

**Bereavement Counseling 1-202-461-6530**

**Civilian Health and Medical Program (CHAMPVA) 1-800-733-8387**

**Caregiver Support 1-855-260-3274**

**Debt Management Center 1-800-827-0648**

**Education 1-888.442.4551**

**Headstones and Markers 1-800-697-6947**

**Health Care 1-877-222-8387**

**Home Loans 1-888-827-3702**

**Life Insurance (VA or Service) 1-800-669-8477**

**National Cemetery Scheduling Office 1-800-535-1117**

**NAS Ft. Worth JRB – I.D./CAC Card Processing 817-782-5244**

**NAS Ft. Worth JRB – Legal Services/JAG 817-782-6007**

**NAS Ft. Worth JRB – Retirement Services Center 817-782-5287**

**NAS Ft. Worth JRB – Visitor Control Center 817-782-5000**

**Pension Management Center 1-877-294-6380**

**Presidential Memorial Certificate Program 1-202-565-4964**

**Telecommunication Device for the Deaf (TDD) 1-800-829-4833**

**VA Benefits 1-800-827-1000**

**VA Combat Call Center 1-877-927-8387**

**Veterans Crisis Line 1-800-273-8255**

**Women Veterans 1-877-222-8387**

**ii. VA & NAS JRB Web Sites**

**Burial and Memorial Benefits [www.cem.va.gov](http://www.cem.va.gov)**

**Caregiver Support [www.cargiver.va.gov](http://www.cargiver.va.gov)**

**CHAMPVA [www.va.gov/hac/forbeneficiaries.asp](http://www.va.gov/hac/forbeneficiaries.asp)**

**eBenefits [www.ebenefits.va.gov](http://www.ebenefits.va.gov)**

**Education Benefits [www.gibill.va.gov](http://www.gibill.va.gov)**

**Environmental Exposures [www.publichealth.va.gov/exposures](http://www.publichealth.va.gov/exposures)**

**Federal Recovery Coordination Program [www.va.gov/icbc/frcp](http://www.va.gov/icbc/frcp)**

**Heath Care Eligibility [www.va.gov/heathbenefits](http://www.va.gov/heathbenefits)**

**Homeless Veterans [www.va.gov/homeless](http://www.va.gov/homeless)**

**Home Loan Guaranty [www.homeloans.va.gov](http://www.homeloans.va.gov)**

**Life Insurance (Military or VA Insurance) [www.insurance.va.gov](http://www.insurance.va.gov)**

**Memorial Certificate Program [www.cem.va.gov/pmc.asp](http://www.cem.va.gov/pmc.asp)**

**Mental Health [www.mentalhealth.va.gov](http://www.mentalhealth.va.gov)**

**My HealtheVet [www.myhealthevet.va.gov](http://www.myhealthevet.va.gov)**

**NAS Fort Worth JRB - <https://cnic.navy.mil/regions/cnrse/installations/nas_jrb_fort_worth.html>**

**National Resource Director [www.nrd.gov](http://www.nrd.gov)**

**Records [www.archives.gov/st-louis/military-personnel](http://www.archives.gov/st-louis/military-personnel)**

**Returning Service Members [www.oefoif.va.gov](http://www.oefoif.va.gov)**

**Social Security Forms [www.ssa.gov/forms/ssa-8.pdf](http://www.ssa.gov/forms/ssa-8.pdf)**

**State Departments of Veterans Affairs [www.va.gov/statedva.htm](http://www.va.gov/statedva.htm)**

**Women Veterans [www.womenshealth.va.gov](http://www.womenshealth.va.gov)**

**VA Vet Centers [www.vetcenter.va.gov](http://www.vetcenter.va.gov)**

**VA Home Page [www.va.gov](http://www.va.gov)**

**VA Benefit Payment Rates [www.vba.va.gov/bln/21/rates](http://www.vba.va.gov/bln/21/rates)**

**\*\*VA Forms [www.va.gov/vaforms/search\_action.asp](http://www.va.gov/vaforms/search_action.asp)**

**Vocational Rehabilitation and Employment [www.vetsuccess.gov](http://www.vetsuccess.gov)**

**Forms: (a) \*Application for Lump Sum Payment of Social Security – Form SSA-8 (11-2013) *(See \*\*VA Forms)***

 **(b) \*Application for Pre-Need Determination of Eligibility for Burial in a VA National Cemetery – VA Form 40-10007 *(See \*\*VA Forms)***

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**Veterans Checklist**

**Create a file consisting of the following and the location of any referenced forms to assist you & your Benefits Counselor in obtaining benefits from the Social Security Administration, Veterans Affairs, and the National Personnel Records Center, for: *(Fill in the blanks)***

**Rank \_\_\_\_\_\_\_ Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Branch U.S. \_\_\_\_\_\_\_\_\_\_**

**SSAN \_\_\_\_\_\_\_ - \_\_\_\_ - \_\_\_\_\_\_\_ DOB \_\_\_\_ /\_\_\_\_ /\_\_\_\_\_\_\_**

**Spouse \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Next of Kin (a) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, (b) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(1) Military Records File**

**a. DD 214 and/or DD 215 (DD 214 is the document outlining service, DD 215 is a document to correct an error**

**on the original DD 214 (Often these are filed at the county clerk’s office of the home of record of the veteran, by the veteran upon discharge from active duty.)**

**b. Separation Papers (if applicable)**

**c. Birth Certificates (Member & Spouse)**

**d. Medical & Dental Records (Maintained by the veteran & the Department of Veterans Affairs.**

**e. Claim # for pending VA Claims \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Fill in the blank)* (Call 800-321-1000 & explain your situation.)**

**f. Civil Service Annuity (If applicable)**

 **g. Marriage Certificate/Records (To include all marriages)**

 **h. Divorce Decree (To include all divorces)**

 **i. Adoptions and Naturalizations Papers (If applicable)**

 **j. State and Federal Income Taxes (Past 3 years)**

**k. Property Tax Bills Note: Some states allow for tax exemption to spouses of 100% Service Connected Disabled military retirees that can be transferred to the surviving spouse.)**

 **l. Deeds and any other related information.**

 **m. Life Insurance Policy – (Notify all insurance companies)**

 **n. Property, Accident, Liability Insurance – (Notify all insurance companies)**

 **o. Hospitalization/Medical Insurance – (Notify all insurance companies)**

**p. Bank Checking/Savings/Credit Union Accounts (Advise financial institutions to change the names on the accounts after all bills are paid and liquidations of accounts are made.**

**q. Deposit Boxes Locations – Notify Bank**

 **r. Savings Bond Information – Cash or transfer balance on all Savings Bonds**

 **s. Stocks, Bonds, and Securities owned ie. Investment Records**

 **t. Credit Card Account Numbers and Mailing Addresses of Creditors**

 **u. Association Listing and Membership Information; provide a listing of**

 **v. Friends and Business Associates including addresses and phone numbers; helps in identifying friends**

 **w. Discuss burial wishes with next of kin to include:**

 **(1) Cemetery Location: (a) National Cemetery Scheduling Office 1-800-535-1117 or**

 **(b) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Fill in the blank)***

 **(2) Burial Wishes: (a) To be buried, (b) To be cremated, (c) To be buried at sea, etc. *(Circle One*)**

 **(3) Apply for a Pre-Need Determination of Eligibility for Burial in a VA National Cemetery using**

 **\*VA Form 40-10007 found at [www.va.gov/vaforms/search\_action.asp](http://www.va.gov/vaforms/search_action.asp)**

**(4) Desire to be buried in uniform? Yes No *(Circle One)***

**(5) Desire to have a Memorial Service? Yes No *(Circle One)***

**(6) Desire a Military Honor Guard Yes No *(Circle One)***

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**(7) Have I prepared an Obituary? Yes No *(Circle One)***

**Note: Many states have specific laws & guidelines regulating cremation & burials at sea. Some require a letter of authority signed by the deceased in order to authorize a cremation. Know the laws that affect your decisions. Information concerning Burials at Sea can be obtained by phoning Navy Mortuary Affairs at (866) 787-0081.**

**(8) Have a Last Will & Testament drawn up outlining your specifics.**

**x. Notify the following in the event of retirees death.**

**(1) Social Security Administration (for death benefits) (800) 772-1213**

**(a) You can also make application for the Lump-sum Death Payment from Social Security in the amount of $255 at this time using \*SSA-8 Form found at [www.va.gov/vaforms/search\_action.asp](http://www.va.gov/vaforms/search_action.asp)**

**(2) Department of Veterans Affairs – (800) 827-1000**

 **(4) Any Fraternal Group you are a member of: (Common Groups)**

**MOAA (800) 234-6622 [www.moaa.org](http://www.moaa.org)**

**FRA (800) 372-1924 [www.fra.org](http://www.fra.org)**

**NCOA (210) 653-6161 [www.ncoa.org](http://www.ncoa.org)**

**VFW (816) 756-3390 [www.vfw.org](http://www.vfw.org)**

**American Legion (800) 433-3318 [www.legion.org](http://www.legion.org)**

**TREA (303) 752-0660 [www.trea.org](http://www.trea.org)**

**Texas Veterans Comm. (800) 252-8387 [www.tvc.texas.gov](http://www.tvc.texas.gov)**

 **(5) Any previous employers that provide pension or benefits.**

**y. Vehicle(s) Registration and Titles Note: It is easier to have both the name of spouse and military retiree on the titles so that the survivor does not have to pay fees for transferring the title.**

**z. VA & NAS JRB Phone Numbers**

**Bereavement Counseling 1-202-461-6530**

**Civilian Health and Medical Program (CHAMPVA) 1-800-733-8387**

**Caregiver Support 1-855-260-3274**

**Debt Management Center 1-800-827-0648**

**Education 1-888.442.4551**

**Headstones and Markers 1-800-697-6947**

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**Home Loans 1-888-827-3702**

**Life Insurance (VA or Service) 1-800-669-8477**

**National Cemetery Scheduling Office 1-800-535-1117**

**NAS Ft. Worth JRB – I.D./CAC Card Processing 817-782-5244**

**NAS Ft. Worth JRB – Legal Services/JAG 817-782-6007**

**NAS Ft. Worth JRB – Retirement Services Center 817-782-5287**

**NAS Ft. Worth JRB – Visitor Control Center 817-782-5000**

**Pension Management Center 1-877-294-6380**

**Presidential Memorial Certificate Program 1-202-565-4964**

**Telecommunication Device for the Deaf (TDD) 1-800-829-4833**

**VA Benefits 1-800-827-1000**

**VA Combat Call Center 1-877-927-8387**

**Veterans Crisis Line 1-800-273-8255**

**Women Veterans 1-877-222-8387**

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**ii. VA & NAS JRB Web Sites**

**Burial and Memorial Benefits [www.cem.va.gov](http://www.cem.va.gov)**

**Caregiver Support [www.cargiver.va.gov](http://www.cargiver.va.gov)**

**CHAMPVA [www.va.gov/hac/forbeneficiaries.asp](http://www.va.gov/hac/forbeneficiaries.asp)**

**eBenefits [www.ebenefits.va.gov](http://www.ebenefits.va.gov)**

**Education Benefits [www.gibill.va.gov](http://www.gibill.va.gov)**

**Environmental Exposures [www.publichealth.va.gov/exposures](http://www.publichealth.va.gov/exposures)**

**Federal Recovery Coordination Program [www.va.gov/icbc/frcp](http://www.va.gov/icbc/frcp)**

**Heath Care Eligibility [www.va.gov/heathbenefits](http://www.va.gov/heathbenefits)**

**Homeless Veterans [www.va.gov/homeless](http://www.va.gov/homeless)**

**Home Loan Guaranty [www.homeloans.va.gov](http://www.homeloans.va.gov)**

**Life Insurance (Military or VA Insurance) [www.insurance.va.gov](http://www.insurance.va.gov)**

**Memorial Certificate Program [www.cem.va.gov/pmc.asp](http://www.cem.va.gov/pmc.asp)**

**Mental Health [www.mentalhealth.va.gov](http://www.mentalhealth.va.gov)**

**My HealtheVet [www.myhealthevet.va.gov](http://www.myhealthevet.va.gov)**

**NAS Fort Worth JRB - <https://cnic.navy.mil/regions/cnrse/installations/nas_jrb_fort_worth.html>**

**National Resource Director [www.nrd.gov](http://www.nrd.gov)**

**Records [www.archives.gov/st-louis/military-personnel](http://www.archives.gov/st-louis/military-personnel)**

**Returning Service Members [www.oefoif.va.gov](http://www.oefoif.va.gov)**

**Social Security Forms [www.ssa.gov/forms/ssa-8.pdf](http://www.ssa.gov/forms/ssa-8.pdf)**

**State Departments of Veterans Affairs [www.va.gov/statedva.htm](http://www.va.gov/statedva.htm)**

**Women Veterans [www.womenshealth.va.gov](http://www.womenshealth.va.gov)**

**VA Vet Centers [www.vetcenter.va.gov](http://www.vetcenter.va.gov)**

**VA Home Page [www.va.gov](http://www.va.gov)**

**VA Benefit Payment Rates [www.vba.va.gov/bln/21/rates](http://www.vba.va.gov/bln/21/rates)**

**\*\*VA Forms [www.va.gov/vaforms/search\_action.asp](http://www.va.gov/vaforms/search_action.asp)**

**Vocational Rehabilitation and Employment [www.vetsuccess.gov](http://www.vetsuccess.gov)**

**Forms: (a) \*Application for Lump Sum Payment of Social Security – Form SSA-8 (11-2013) *(See \*\*VA Forms)***

 **(b) \*Application for Pre-Need Determination of Eligibility for Burial in a VA National Cemetery – VA Form 40-10007 *(See \*\*VA Forms)***

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