PROMOTING PREPAREDNESS - Part 1

Assembling Military Records and Important Personal Documents

Everyone, young and old, can and should have an up-to-date estate plan folder that contains essential information and copies of various service related documents as well and other important personal documents. It goes without saying that both husband and wife should be thoroughly familiar with every item in the estate plan folder, and they should consider designating a personal representative who should be made aware of it as well. The format for the plan is not as important as **having it well organized**. Some of the documents will require safekeeping, but often copies of these documents can be made and kept in a more accessible place so that the information is immediately accessible if needed.

There are several pre-published formats available to make this task easier, including the *Personal Affairs Workbook* in MOAA's *Help Your Surviving Spouse -- Now!* pamphlet. At the very least military retirees should insure that their estate plan folder contains the following documents:

- Final DD Form 214, Certificate of Release or Discharge from Active Duty
- ** Retirement Order
- ** Statement of Service
  ** NOTE: For Retired Reserve - Non full-time Military
- Retiree Account Statement which is received annually by mail from DFAS
- Survivor Benefit Plan Election - obtain from the Retiree Account Statement
- Retiree & spouse's ID card - ID cards must be reissued to widows/widowers
- Medical Records - if service disability is claimed or might be claimed
- Veteran Administration "Case" Number, if established and Letter stating percentage of disability
- Social Security Number - all family members and the Benefit Statements which are received annually from the SSA.
- Retiree and spouse's Will
- Birth Certificate - all family members
- Adoption and Custody documents
- Marriage and Divorce documents
- Immigration and Naturalization papers
- Income Tax Records
- Insurance policies - Life, home, auto, boat, etc.
- Annuity Contract Statements
- Investment Portfolio Summaries
- Copy of Deeds, Abstracts, Mortgages, etc.
- Titles and Registrations - Auto, Boat, etc.
- List of Safety Deposit Box(es) and location.
- List of all Bank Accounts, Checking, Savings, etc., and location.
- List of Credit Cards in retiree and spouses"s name.
- List of Outstanding Debts.
- List of Monies, Property, etc. owed to retiree or spouse.