

PROMOTING PREPAREDNESS - Step 5

Preparing the Surviving Spouse or Next-of-Kin

Anyone who has served as a Military Retiree Survivor Assistance Team member will tell you how heartbreaking it is to hear the surviving spouse of a military retiree say "I don't know what to do first or where to turn to for help." However this often happens, especially whenever a retiree has passed away suddenly without leaving his spouse clearly stated and easy to find instructions on where to find important papers, who to notify and how to carry out his funeral and burial wishes.

The Personal Affairs Committee of the Florida Council of Chapters has addressed this problem by creating a form called "Letter to Next of Kin." This downloadable form makes it easy for a retiree to leave behind essential "First Action" information in a simple format by merely filling in a few blanks. This one-page (front & back) form does not require secure storage and could easily be kept in the spouse's wallet or handbag where it could be easily found.

A "Letter to Next of Kin" form can be created by printing pages 2 & 3 of this document or by logging on to the FCOC website at <http://moaafll.org> and clicking on "Personal Affairs," then look near the bottom of the paragraph entitled "Individual Member's Responsibility to their Spouse or Next of Kin" for a download link.

If you choose not to use this particular form, at least use the idea and prepare a similar document containing essential "First Action" information in a simple, easy to store format. You will enjoy greater peace of mind for having done so.

MY LETTER OF INSTRUCTIONS
TO MY SPOUSE, NEXT OF KIN OR PERSONAL REPRESENTATIVE

Date: _____.

From Retiree: Rank _____ Name _____.

Branch _____ SSAN _____ DOB ____ / ____ / ____.

To: Spouse _____.

(or) Next of Kin _____.

(or) Personal Representative _____.

These forms and documents will be needed immediately upon my death, and are located:

DD Form 214 (if retired from active duty) _____.

Retirement Letter (if retired from reserves) _____.

Military ID cards (member and spouse) _____.

Birth Certificates (member and spouse) _____.

Retiree Account Statement (retired pay) _____.

You should have them immediately available, then contact the following:

Nearest military base _____.

Casualty Assistance Representative _____ Phone _____.

(or) Survivor Assistance Team _____ Phone _____.

A detailed **Retiree Casualty Assistance Checklist** or the equivalent is (already prepared) and located
_____ or (will be furnished) by the CAR or SAT. It is important that
either the CAR, SAT or yourself notify the appropriate Military Pay Center, Phone
_____ and the Social Security Administration Phone 800-772-1213 ASAP to
avoid financial mistakes.

My choice of Funeral Director is _____ Phone _____.

This Funeral Director (has) (has not) been pre-briefed and (has) (has not) been prepaid. You
should request to purchase at least 5 certified copies of a **Death Certificate** showing the **Cause
of Death** thereon. (Uncertified and fax copies can be used for some purposes to save expenses.)

Our immediate family and closest friends, **especially those who can be helpful** would include:

_____ Phone _____.

_____ Phone _____.

_____ Phone _____.

_____ Phone _____.

_____ Phone _____.

That should take care of all the immediate pressing notifications.

As regards funeral and burial planning, my preferences are:

I wish to be.(circle one): Buried Cremated
Name of cemetery where I want to be buried: _____
Location of burial plot: _____
Buried in Uniform? (circle one): NO YES Located _____
Memorial Service? (circle one): NO YES
Desire military honor guard if available: NO YES
Have I prepared an obituary? NO YES Located _____
Other details and considerations: _____

When time and circumstances permit, accomplish the following:

Make an appointment for detailed casualty assistance with: *(list the office, person and phone #)*.

NOTE: The Casualty Assistance Representative (CAR) at a military base has resources that can expedite and simplify the preparation of forms to apply for various benefits, etc. If a CAR is not available, the Military Finance Center (MFC) to which you reported my death will send you a package of forms instead. A local Survivor Assistance Team (SAT) member can assist you in the preparation and filing of these forms. Either the CAR or SAT person will have a detailed Survivor's Checklist as well to insure that all necessary contacts, both military and civil, are made.

Spouse, **get a new Military ID Card** at: _____
You will need both old ID cards and a death certificate. Call first to confirm.

Other documentation which you will need, and the **location thereof**, are as follows:

Safe Deposit Box # _____ : _____

Medical & Dental Records: _____

Vehicle's Registrations, Titles, etc.: _____

Real Estate and/or Lease/Rental Records: _____

Insurance Policies & Payment Records: _____

Investment Records (CDs, Mutual Funds, etc.): _____

Bank Accounts; names & Phone Numbers: _____

Other: _____

Other important Tasks: (These may also be listed in the Survivor's Checklist)

Contact Social Security, revise your account. Change titles on vehicles and "Joint Tenancy" property.

Advise banks, change names on accounts: Notify all Insurance Companies (life, auto, home).

Advise professional and social organizations. Contact VA for possible benefits (including burial).

I UNDERSTAND THAT THIS IS NOT A LEGAL DOCUMENT AND IS FOR GUIDANCE ONLY:

Signature of Military Retiree: _____