

# RETIREE CHECKLIST:

## WHAT SURVIVORS SHOULD KNOW

To follow previous Bulletin editions, we provide here the checklist Navy Shift Colors periodically publishes for retirees and their family members to provide everyone some help in planning for the future. It is not all-inclusive and should be used with other estate planning tools. Use this checklist when filling out the **RAO Retiree Personal Affairs Log**.

### 1. CREATE A MILITARY FILE

- Retirement orders
- DD Form 214
- Separation papers
- Medical records

### 2. CREATE A MILITARY RETIRED PAY FILE

- Claim number for pending VA claims
- Address of VA office being used
- List of current deductions from benefits
- Name, relationship, and address of beneficiary of unpaid retired pay at the time of death
- Address and phone number of DFAS:

**Defense Finance and Accounting Service**

**U.S. Military Retired Pay (or Annuitant Pay)**

**8899 E 56th Street**

**Indianapolis, IN 46249-1200 (or 46249-1300 for Annuitant Pay)**

**800-321-1080 option #3 (for deceased members)**

### 3. CREATE AN ANNUITIES FILE

- Survivor Benefit Plan (SBP) information  
(Addition information regarding SBP annuity claims can be obtained from DFAS at 800-321-1080)
- Reserve Component Survivor Benefit Plan (RCSBP)
- Retired Serviceman's Family Protection Plan (RSFPP)
- Civil Service/Federal Employee survivor annuity

### 4. CREATE A PERSONAL DOCUMENT FILE

- Marriage Records
- Divorce decree
- Naturalization and adoptions papers

### 5. CREATE AN INCOME TAX FILE

- Copies of state and federal income tax returns

### 6. CREATE A PROPERTY TAX FILE

- Copies of tax bills
- Deeds and any other related information

### 7. CREATE AN INSURANCE POLICY FILE

- Life Insurance
- Property, accident, liability insurance
- Hospitalization/Medical Insurance

### 8. MAINTAIN A LISTING OF BANKING AND CREDIT INFORMATION IN A SECURE LOCATION

- Bank account numbers
- Location of all deposit boxes
- Savings bond information
- Stocks, bonds and any securities owned
- Credit card account numbers and mailing addresses

### 9. MAINTAIN A MEMBERSHIP LISTING OF ALL ASSOCIATIONS AND ORGANIZATIONS

- Organization names and phone numbers
- Membership fee information

### 10. MAINTAIN A LIST OF ALL FRIENDS AND BUSINESS ASSOCIATES

- Include names, addresses and phone numbers

### 11. DISCUSS YOUR WISHES FOR BURIAL AND FUNERAL SERVICES WITH YOUR NEXT-OF-KIN.

At a minimum the discussion should include cemetery location and type of burial (ground, cremation, or burial at sea). This knowledge may assist your survivors to carry out all of your desires.

### 12. YOU COULD ALSO PREARRANGE YOUR FUNERAL SERVICES VIA YOUR LOCAL FUNERAL HOME.

Many states will allow you to prepay for services.

### 13. INVESTIGATE THE DECISIONS THAT YOU AND YOUR FAMILY HAVE AGREED UPON.

Many states have specific laws and guidelines regulating cremation and burials at sea. Some states require a letter of authority signed by the deceased in order to authorize a cremation. Know the laws in your specific area and how they may affect your decisions. **Information regarding Burials at Sea can be obtained by phoning Navy Mortuary Affairs at 866-787-0081.**

### 14. ONCE YOUR DECISIONS HAVE BEEN MADE AND YOU ARE COMFORTABLE WITH THEM, have a will drawn up outlining specifics.

### 15. ENSURE THAT YOUR WILL AND ALL OTHER SENSITIVE DOCUMENTS ARE MAINTAINED IN A SECURE LOCATION KNOWN AND ACCESSIBLE BY YOUR SURVIVORS.