

SURVIVING SPOUSE ASSISTANCE CHECKLIST (11/09 UPDATE)

Following are some “helps” and there may be more to come. If you have any questions or require any other advice contact your SMART National Surviving Spouse Advocate, and your family and attorney. Additionally, if you have any suggestions or modifications to this GUIDE please advise Via email to SMART Hq. smart@smartrving.org. We appreciate and will acknowledge your input.

1. Obtain about 20 copies of the Form DD 214. Certificate of Discharge or Separation. Make sure that the form(s) cover the entire period of your spouse’s military service career. In some cases where he served in different branches or components (active, ready reserve, active reserve, broken service, enlisted and/or commissioned time) there will be a number of forms which added together will equal their entire service. Have these copies notarized or otherwise authenticated.

NOTE The local County Veterans Service Office (VSO) contact information may be located in your local telephone directory; if a VSO is not available contact the nearest Veteran’s Administration (VA) Office. Additional or primary assistance is also available at the Retired Activities Office (RAO or RAD) at the nearest military facility. Call and make an appointment. These specialist will assist in obtaining correct or additional copies, validating records as well as timeline verification (total years of service) and making or obtaining additional copies. *Contact any and all military fraternal organizations of which the member might have belonged such as VFW, American Legion, FRA, MOAA, or others for assistance and guidance. They can be a valuable local asset and source of help as well as checking to determine if you are covered by various beneficiary plans /programs.*

2. Copies of Death Certificate. Have at least 10 originals. *Copies need to be notarized. The funeral home will provide these documents. Copies may be delayed in certain cases but you are encouraged to continue with other tasks; especially high priority pays and benefits matters. The County VAO and Base RAO/RAD will attend to the military Burial Detail and matters including death benefits due you.*

3. You and Your Spouse’s Military ID Card. You will need to go to the Pass and ID Office at the nearest Military Facility and have a new permanent Widow’s ID card issued. If your ID card has expired obtain a DD1175 form from the VSO or RAO; request assistance in completing and submission. Usually an appointment must be made in advance. Insure that replacement ID cards are available at time of issue as they are sometimes in short supply. You will need two forms of picture identification i.e. Driver’s License, Passport, etc. Surrender the deceased’s ID card to Pass and ID. They sometimes cut out a portion such as the SSN or other data if you wish to keep it for a memento: depends on the installation and current Security Treat levels. While at the Pass and ID Office, also have them check and update your DEERS information. They will send you to a medical facility or Personnel Section on base to complete the DEERS information

4. Copies of Marriage License, Birth Certificates and Divorce Decrees (if any). Have 10 copies available and notarized. Notary service may be available at the County Veteran’s Services Office, County Courthouse, or the VA. Each County (or similar entity such as Parish etc.) has a Veteran’s Services Office. Again they may be found in the local telephone directory under County Government or Veteran’s Affairs listings. Also the Retired Activities Offices or Casualty Assistance office at the nearest military may be located through the Base Operator.

5. Your Vehicle(s) Registration forms....Cars, motor home and other licensed vehicles. Also Proof of Insurance and other required licensing documents. Have all these vehicles registered in your name, as well as any other person you may designate, at the State Revenue Office or

License Bureau. It is suggested that vehicles be registered in the "OR" format. Take these same items to Pass and ID as well for proper registration on the military facility..

6. Copies of all personal property that is currently in joint ownership. Take to your Tax Assessor and your Attorney to have ownership updated. You may rate certain tax reductions or advantages.

7. Have your Will, Durable Power of Attorney, instructions, codicils or Family Trust updated by your attorney. Family Trusts are a valuable legal instrument that avoids Probate Court. This helps considerably in actions or judgments the Probate Court may make. In the probate actions/decisions, the court may also get a portion of your Estate as an Administrator. You and your attorney should make your own decisions, not an entity that is not a member of your family. Seek advice and help from your attorney or the Base Legal Office.

8. Have all Bank Account(s) and Investments updated to current status. Ensure all financial information/statements with account numbers are complete and correct. Check into any service or VA connected insurance or benefit plans you may be the beneficiary of. Update these with Banks, Credit Unions, Insurance, Investment brokers (IRA's, CD's and other Investments).

9. Any Adoption or Naturalization documents as may be applicable.

If you need Legal Assistance contact your attorney or view the following Web Site www.legalassistance.law.af.mil/locator.php to locate a legal assistance office in your area.

PRIORITIES

1. Contact the County Veteran's Service Officer, local VA Office, or the Retired Activities Office. They will initiate procedures to stop your Spouse's Retired Pay and initiate any benefits do you.. Contact your Bank and update the Account Balance and Deposits. Once the Defense Finance and Administration (DFAS) is aware your Spouse's demise, DFAS will electronically withdraw any funds received in the month of death and STOP any future payments. Do not spend any funds received in that month.. Those County VSO, Military RAO's or the VA will fill out the forms for you to sign, attach proper documentation, and submit. This also applies to any VA or service connected or OPM payments received.

2. Initiate application for ***Survivors Benefit Plan (SBP)*** [if so enrolled] so that payment may be deposited to your account. Caution: Spend wisely as you may have to rely on your Savings for a period of perhaps two months as "the wheels turn slowly", but in the end, will balance out.

3. Take care of any Death and Burial Benefits including your right to burial. The funeral home might have taken care of some of these matters....but double check. In the case of **Cremation Remains disposition or Burial at Sea**, You may call (888) 647-6676 and select from several options (burial at sea is option 4). Request information from SMART Hq. or National advocate.

4. Take care of your I.D. Card and vehicle registration. You will be issued a Widows ID card which has no expiration date. While there update all your DEERS information.

5. Call and make an appointment with the local Social Security Administration (SSA) office. They will process you through the future SSA benefits, pay and all. Watch out for concurrent payment deductions and counsel with the RAO, VA and VSO about your rights. Depending on SSA payments you may elect to receive your spouse's annuity vs. yours....whichever is higher. There is no longer an "offset" to your SSA in relation to Survivor's Benefit and other payments. Good counseling with the VSO, RAO or VA rep will be valuable.

6. Take care of all matters having to do with licensing, registration and taxation matters (Real and Personal property) with applicable agencies. There are sometimes surviving spouse reductions in taxes and licensing. In most instances the local Revenue Office will be most lenient.

7. Credit cards, checking and savings accounts, safe deposit boxes, investment programs and like financial items. Notify the issuing entity of the death and ask for final billing and closing the account (s). Open or change into your own account (s), in your name or those you may designate. Seek financial manager or an attorney's valued advice and assistance.

8. **File any and all Disability and Insurance claims.** Some may be Service connected and some may be commercial. The Veterans Assistance Officer will be of valuable assistance in these matters, especially those that are service related and paid by current allotments.

9. **Human Organs Donation Programs.** Contact the proper Agency or organization: they will take care of those matters, if so notified. Please have any Organ donor information appended to Driver's Licenses, or have other documentation available.

This may all seem overwhelming, but just go to the County Veteran's Service Office or Retiree Activities Office on the Base and they will help you. Take all records (Personal Military and Health) as well as other military documentation for review. Recent decisions regarding Agent Orange and other military occupation related matters might be beneficial.

It is strongly suggested that you always have a family member or a close friend accompany you on any visits to the various offices. They are a good source to take notes, verify information and ask questions that you may not during this stressful and emotional time.

If there are divorce matters as pertains to the member; ensure that you will be the beneficiary of any items such as Survivors Benefit Plans, insurance or personal property matters resolved ahead of the member's death. If not corrected a previous spouse may be the beneficiary and that is troubling and often not correctable.

This document is provided as a Good Samaritan effort and as a service to our SMART members. Hope it helps....if any questions, give me a call or an email.

Please note: "This information is being provided to members from a S*M*A*R*T member as a service and at no charge. *This should not be considered as legal advice and is provided as a Good Samaritan effort.* SMART not responsible for the accuracy of information." (SMART is acronym for Special Military Active Retired Travel club)

Take care of yourself and God Bless, <:////><
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