CASUALTY ASSISTANCE CHECKLIST

(to be completed by retirees and spouses and kept in your files for your survivors to use)

Name:
Social Security Number:
Date of Birth: Place of Birth:
Date of Retirement: Retired grade/rank:
Enrolled in RSFPP, SBP, SSBP (circle all that apply) **Did you disenroll from this plan?** YES NO (circle one)
VA Claim #:
Eligible to draw VA disability compensation (even if not currently in receipt): YES NO
Receiving Social Security: YES NO If yes, age at which first received:
Organ donor: YES NO
Is there a living will? YES NO

SPOUSE INFORMATION

Name: Date of birth: SSN:

MARRIAGE INFORMATION

Date of Marriage: Place of Marriage (City, State, Country):

CHILDREN INFORMATION

Name Birthdate Address Incapable of self-support?

INSURANCE POLICIES

Policy # Company Amount (include "as of" date) Beneficiary Agent phone #

INVESTMENTS

Type (IRA, CD, Mutual Fund) Company Amount (include "as of" date) Agent phone #

BANK ACCOUNTS

Bank Name Phone # Type of Acct Amount (include "as of" date) Account #

CREDITORS

Name & Address Phone # Account # Balance Due (include "as of" date) Life insurance?

BURIAL INFORMATION

Who should be notified of your death:

Name	Relationship	Address	Phone #

Do you want to be (circle one): Buried Cremated?
Name of cemetery where you want to be buried:
Do you want to be buried in your uniform? YES NO
Do you want a memorial service? YES NO If yes, where?
Have you purchased a burial plot? YES NO If yes, where?
Do you have a preference of funeral home? YES NO If yes, which one?
Do you want a military honor guard? YES NO

LOCATION OF DOCUMENTS

DOCUMENT	WHERE LOCATED
Living Will	
Current Retired Pay Statement	
Marriage Certificate(s)	
Divorce Decree(s)/property settlement(s) (from previous marriages of retiree or spouse)	
Death certificate(s) (from previous marriages of retiree or spouse)	
Birth certificates/adoption papers (retiree, spouse, children)	
DD Form(s) 214 (Active Duty Discharge Record) (for all periods)	
Retirement Orders	
Safe-Deposit Box List Contents:	
Will	
Vehicle Registration & Title	
Insurance policies	
Investment papers	
Burial plot information	
Uniform for burial	
Medical and dental records	
Real Estate deeds	
Tax returns	

PHONE NUMBERS

Casualty Assistance Office (immediate assistance upon retiree's death) call 1-800-626-3317 or, from overseas, call collect (703) 325-7990
Retirement Services Office (follow-up assistance) numbers are listed on pages 9 and 10 of *Echoes*
VA 1-800-827-1000 VA Insurance 1-800-669-8477 Social Security 1-800-772-1213
Retired Pay 1-800-321-1080 Annuitant Pay (for RSFPP and SBP info) 1-800-435-3396
ID Card office Lawyer