

# Widow/Widower Checklist

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This checklist is intended to help remind family members and surviving spouses about the many subjects that need attention at the time of death of a retired service member. This list is not all-inclusive but is intended to be an aid in administrative matters.

Notify the Defense Finance and Accounting Service Center, U.S. Coast Guard Human Resources Service and Information Center, or U.S. Public Health Service by telephone of the death of the service member. This call will generate the RSFPP/SBP/RCSBP/SSBP annuity application process and application for arrears in pay.

Army, Marine Corps, Navy, and Air Force: 1-800-321-1080

U.S. Coast Guard and NOAA: (800) 772-8724

USPHS: (800) 638-8744

If a Civil Service or Federal Employee Retirement System (CSRS or FERS) retiree, notify the office of Personnel Management at (724) 794-8690 (Civil Service SBP, Casualty and Federal Group Life Insurance inquiries).

If the deceased was a CSRS or FERS retiree and participated in the Thrift Savings Plan, contact the Federal Retirement Thrift Investment Board at (504) 255-6000.

**If you live near a military installation and want assistance with military administrative matters, call the Casualty Assistance Officer. (This service may not be available at all locations.) Also contact the Retirement Service Office, or Retired Activity Office if one is near your place of residence.**

Notify the Social Security Administration at (800) 772-1213 (Social Security survivor benefits and death benefit).

If the death could have been due to uniformed service-connected causes, contact the nearest Department of Veterans Affairs (VA) Regional Office by calling (800) 827-1000. This call could initiate application for potential VA benefits, i.e., burial benefits, application for headstone, and Dependency and Indemnity Compensation (DIC). Some surviving spouses will qualify for these benefits; many will not. It's better to be on the safe side and call. Let the VA decide your eligibility for those benefits.

If a Civil Service or Federal Employee Retirement System (CSRS or FERS) retiree, notify the office of Personnel Management at (724) 794-8690 (Civil Service SBP, Casualty and Federal Group Life Insurance inquiries).

Some associations offer spouse assistance to their members and will notify many of the places listed on this checklist, e.g. Army and Air Force Mutual Aid at (800) 336-4538 or (703) 522-3060; Armed Forces Services Corporation at (888) 237-2872 or (703) 379-9311, Navy Mutual Aid Association at (800) 628-6011 or (703) 614-1638.

Notify all insurance carriers with whom the deceased had life insurance, burial insurance, etc. Have policy numbers available.

Notify all banks, stock brokerages, or other financial institutions with which the deceased had accounts. Have account numbers and any other pertinent information available.

If the deceased also was retired from employment in the private sector and a retirement plan was involved, notify that employer or pension plan administrator.

Notify your attorney, trust administrator, or the executor of the estate.

Others you may need to notify:

Credit card companies or charge accounts. Have account numbers available, if known.

Accountant/ CPA or tax preparer.

Other insurance companies.

Department of Motor Vehicles.

Fraternal or professional organizations.

City, County, and State property offices.

Locations where stocks, bonds, and securities are held.

Nearest military installation personnel office. (Renew family member ID cards.)

Automobile leasing agent.