

CHECKLIST FOR SURVIVORS OF DECEASED MILITARY RETIREES

(Ver. 14 May 2022)

This checklist applies to the affairs of military retirees or their survivors who resided in the New England area at the time of the retiree's death. Not all items will apply, but you should consider each item to determine if it needs your attention. Check off each item as you complete it, or if you determine the contact is not necessary do nothing.

First Contacts

Military Retiree Pension: Retirement pay stops on the day of the retiree's death. Inform the Defense Finance and Accounting Service (DFAS) of the death. Call **800-321-1080, menu option 2.**

Have the following information available.

For the deceased retiree: Name, SS#, Date of Birth, and Date of Death

For the caller: Name, address, phone # and relationship to the deceased.

When notified, DFAS will stop monthly payments to minimize any overpayment.

Within 7-10 business days after reporting the death to DFAS, you should receive a letter containing the following documents:

- SF1174 Claim for Unpaid Compensation of Deceased Member of the Uniformed Service.
- Annuity account forms and instructions (if the decedent was enrolled in the Survivor Benefit Plan or the Retired Serviceman's Family Protection Plan)

For online assistance with the forms, and for online written and video instructions to complete them, enter "DFAS Home" in your browser or <https://www.dfas.mil/>. Open "Retired Military & Annuitants" in a new tab and scan the list of tools for the desired forms and instructions. Always open each of these sites in a new tab.

- **Social Security:** Social Security pays benefits for the month prior to the month in which an individual dies. Even if a funeral home informs the Social Security Administration of the death, a survivor should call **800-772-1213** or visit the nearest office. Provide the numbers, names, and dates of birth. For online services, open ssa.gov; click "Online Services." <https://ssa.gov/onlineservices/>
- **Veterans Affairs:** If the deceased was receiving payments authorized by the Department of Veterans Affairs (e.g., for disability compensation or a pension), you must report the death by calling **800-827-1000**. When prompted, say "report a death." Have available the veteran's name, social security number, date of birth and date of death.

For questions regarding eligibility or claims for VA benefits, call as just described.

For online information about survivor, burial, headstone, and other benefits, go to <http://www.va.gov/> and click on the desired service (e.g., "Family member benefits" or "Burials and memorials").

For Veterans Group Life Insurance claims call **800-419-1473**.

For Service-disabled Veterans Life Insurance claims call **800-669-8477**; or online at [benefits/va.gov](https://benefits.va.gov).

- Civil Service Pension or Annuity: If the deceased was a Civil Service retiree or receiving an annuity, notify the Office of Personal Management (OPM): Call **888-767-6738, press 1** and after announcements **press 4** (Report a death). Have available the OPM Retirement Claim Number. The OPM retirement website is [www. Opm.gov/retirement-services/](http://www.Opm.gov/retirement-services/).
- Private Pensions: If the deceased received funds from a private employer-sponsored plan, or from investments, notify the fund administrator or retirement custodian.

Institution: _____ Phone: _____
 Account #: _____

- Life Insurance: If the deceased had life insurance, contact the insurer(s) to claim survivor benefits.

Insurer: _____ Policy #: _____ Face Amount: _____
 Insurer: _____ Policy #: _____ Face Amount: _____
 Insurer: _____ Policy #: _____ Face Amount: _____

- Thrift Savings Plan: If the deceased participated in the federal government’s Thrift Savings Plan (TSP), contact the Federal Retirement Thrift Board at **877-968-3778, menu option 3**, then stay on the line. Deceased Social Security Number: _____

- Legal Matters: Inform the lawyer, Trust Administrator, and/or Executor of the Estate.

Next Steps

- Financial institutions: Notify the banks, brokers, and investment firms where the deceased saved, invested, and/or maintained funds. Locate all savings and checking accounts, CDs, IRAs, stocks, bonds, and securities. For each account have the following information: Institution name, telephone number, account number, and the name on the account.
- Auto, Home, Medical, Property, and Other Insurance: Contact the insurer(s) to stop or transfer insurance coverage. If possible, have the applicable policy for reference during the phone call.
- Accountant: If the deceased had an accountant or tax preparer, inform them of the death. Perhaps they can assist with financial matters.
- Loans and Credit Cards: Review loan and credit card statements for balances and periodic payments. Update contact information for holders of debt accounts. Contact each periodic payment payee to cancel, confirm, and/or adjust payments. For each account, have the Institution name, its telephone number, account number, the name on the account, and balance due.
- Taxes: Contact municipal, county, and state tax offices. Update information and provide necessary documentation. NOTE: Some states and/or municipalities provide property tax exemptions to certain survivors of military retirees. Municipal offices administer these exemptions.

- Military-related Health Care Providers: If the deceased has received bills for health care, the survivor should contact the retiree’s primary health care provider:

Martin’s Point, US Family Health Plan	888-674-8734	www.usfamilyhealth.org
Dental and/or Vision – FEDVIP	877-888-3337	www.benefeds.com
TRICARE For Life (TFL) (for 65 or older)	866-773-0404	https://tricare.mil/tfl
TRICARE (East Region) (for under 65)	800-444-5445	www.humanamilitary.com

Identification Cards (ID Cards)

- ID Card: Return the identification card of the deceased, with a certified death certificate, to an ID Card (DEERS) issuing office.
- Surviving spouses: To show eligibility for medical benefits, base access, etc., surviving spouses **MUST** obtain a new ID card to change the ‘Sponsor’ from the deceased to the Surviving Spouse. The following offices issue ID cards and update DEERS information **for all military branches**.

Maine

Augusta	Army National Guard, 194 Winthrop St	207-430-5914
Bangor	Air National Guard, 102 Ashley Street, Suite 489	207-404-7387
Bath	SUPSHIP, 574 Washington Street	207-442-5153
Kittery	Naval Shipyard Main Gate, 1 Walker Road	207-438-2640
Limestone	DFAS Limestone, 27 Arkansas Rd	207-328-1116
So. Portland	US Coast Guard, 259 High Street	207-741-5424
So. Portland	Air National Guard	207-756-7853

New Hampshire

Littleton	National Guard Armory, 350 Meadow Street	603-715-3452
Concord	Army National Guard, 1 Minuteman Way	603-225-1326
Londonderry	Armed forces reserve Ctr., 64 Harvey Rd	910-598-9683
Newington	Air National guard, 302 Newmarket Street	603-430-3514
Portsmouth	Naval Shipyard, Main Gate, 1 Walker Street	207-438-2640

Vermont

Colchester	Air National Guard, 798 VT National Guard Road	802-338-3419
So. Burlington	Army National Guard, 105 NCO Drive, Bldg 170	802-660-5225
White Rvr Jct.	Navy Support Center, 207 Holiday Drive	802-295-0050 ext. 11

Massachusetts

Hanscom AFB	Army National Guard HQ, 2 Randolph Rd	339-202-3002
Hanscom AFB	66 th ABG DEERS Office, Brown Bldg, 20 Schilling Circle	781-225-1330
Chicopee	Westover Air force Base, 100 Starlifter Rd	413-557-3874

New York

Watervliet	Watervliet Arsenal	518-266-5601
Scotia	109 th AW New York, Air National Guard	518-344-2436

For other ID Card offices, see: <https://idco.dmdc.osd.mil/idco/>

- **Military Funeral Honors**: If the family desires military funeral honors, they can contact the funeral home who should be able to arrange them.
- **Military Records**: To request all or part of the deceased retiree's military record, such as the **DD214** or medical records, complete and mail a Standard Form 180. To obtain the form, call the Retired Activities Office or download it online at <http://www.archives.gov/research/order/standard-form-180.pdf>.

For those who either entered or left the military from Massachusetts there is a copy of your **DD214** on file at the Military War Records Office. The Point of Contact for Massachusetts is: **1-508-422-1993**

THE MILITARY WAR RECORDS OFFICE
OFFICE OF THE ADJUTANT GENERAL
50 MAPLE ST. MILFORD MA 01757

Veterans who were enrolled in the VA should also be able to obtain a copy of the DD214 from a local VA Facility.

- **Veteran Service Officers**: In many states, towns and cities will have VSO's who often have their offices located in the Town or City Hall. In **Massachusetts** every moderate to large sized town/city has a VSO (while the smaller villages and towns are covered by the VSO assigned to a larger nearby town). Contact Mass Dept of Veteran Services at **617-210-5480** to locate a VSO near you or you can search online at <https://massvetben.org/> and click on "VSO finder."

Assistance Resources

Retiree Activities Offices: These offices, staffed by volunteers, provide information and assistance regarding rights, privileges, and benefits from the military services. **Each office serves retirees and survivors from all military branches.**

Location	Phone	Email
Brunswick ME, Landing Navy RAO	207-406-4103	navyraomevt@gmail.com
Kittery ME, Naval Shipyard Portsmouth	207-438-1868	pnsyrao@gmail.com
Watervliet NY, Watervliet Arsenal	518-266-5810	wvarao@gmail.com
Hanscom Air force Base, MA	781-225-1310	rao.hanscom.afb@gmail.com