

**Fort Sam Houston**

**Survivor Assistance**

**Checklist**

**RETIREE CASUALTY ASSISTANCE CHECKLIST**

Retiree's Name \_\_\_\_\_

Social Security Number \_\_\_\_\_

Religious Preference \_\_\_\_\_

Date of Birth \_\_\_\_\_

Place of Birth \_\_\_\_\_

**DOCUMENTS NEEDED TO CLAIM DEATH BENEFITS**

- a. DD Form 214 or retirement orders if applicable
- b. Copy of marriage certificate
- c. Copy of death certificate
- d. Copy of birth certificate for dependent children
- e. Copy of divorce decrees or death certificates from previous marriages (if applicable, retiree and spouse)
- f. Copy of burial receipts/contract
- g. **Surviving Spouse's Social Security Card**
- h. Banking Information for Direct Deposit Account# and Routing#

**RETIREMENT PAY DATA (SEE PAY STATEMENT)**

Retired Pay as of date: \_\_\_\_\_

Gross Pay \$ \_\_\_\_\_

Net Pay \$ \_\_\_\_\_

VA Disability Pay \$ \_\_\_\_\_

**SURVIVOR BENEFIT INFORMATION (SEE RETIREE PAY STATEMENT)**

Survivor Benefit Annuity before age of 62 \$ \_\_\_\_\_

Annuity after age 62 \$ \_\_\_\_\_

**VETERANS ADMINISTRATION DATA (IF APPLICABLE)**

VA Claim # \_\_\_\_\_

VA Insurance Policy/File # \_\_\_\_\_

## **WHAT TO DO WHEN ILLNESS OR DEATH OCCURS**

In case of serious illness or death, your doctor should be called immediately. He/she may suggest calling an ambulance or rescue service.

A. Record these phone numbers below, also have them noted in a directory near your telephone.

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Name of Doctor

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Telephone Number

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Ambulance or Rescue Service

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Telephone Number

B. Call a relative or friend who can immediately assist you in handling some of the details listed below.

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Name and phone Number

C. Call a clergyman (if desired)

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Name and Phone Number

D. Call a funeral director.

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Name and Phone Number

The funeral director generally assumes the responsibility for the death notice for which there is a charge. You may also want to submit an obituary news story with photograph. Consider out-of-town newspaper notification.

VISIT OR CALL

Local VA Office

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Address

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Phone Number

Local Casualty Assistance Office

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Address

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Phone Number

Local Social Security Office

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Address

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Phone Number

Office of Personnel Management (Civil Service)

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CSA Number

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Address

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Phone Number

## THINGS TO KNOW AND PLAN FOR;

### **UPON THE DEATH OF A RETIREE**

#### Tasks to Accomplish

- Contact the funeral home of your choice
- Request at least 8 copies of death certificates
- Contact Casualty Assistance at Fort Sam Houston
- Contact Social Security Administration
- Contact Veterans Administration (if applicable)
- Call Office of Personnel Management (if applicable)
- Contact Military ID section to update dependent ID Card (DEERS) and turn in retiree's ID card.
- Change beneficiaries on all insurance policies
- Close credit card accounts and destroy cards
- Change joint bank accounts and real property
- File private insurance claims
- File medical claims (if applicable)
- Change auto title
- Check Probate Requirements (Legal Assistance)
- Update will (Legal Assistance)

### **UPON THE DEATH OF THE SPOUSE OF RETIREE**

#### Tasks to accomplish

- Contact the funeral home of your choice
- Contact Ft. Sam Houston Casualty Assistance office
- Contact Social Security Administration
- Contact Veterans Administration (if applicable)
- Contact finance center in London, KY (to suspend or stop SBP)
- Close out medical and dental records
- Change beneficiaries on all insurance policies
- Change beneficiary for unpaid retired pay
- Close credit card accounts and destroy cards
- Change joint ownership of real property
- Turn in military dependent ID Card
- File medical claims (if applicable)
- Check Probate requirements (Legal Assistance)
- Update will (Legal Assistance)

## DOCUMENTS

TYPE OF DOCUMENT	LOCATION	LENGTH OF TIME KEEP ON FILE
<b>Personal</b>		
Birth Certificate	H S OF OT	Permanently
Marriage Certificate	{ } { } { } { }	Permanently
Divorce Decree	{ } { } { } { }	Permanently
Social Security Card	{ } { } { } { }	Permanently
DD Form 214	{ } { } { } { }	Permanently
Passports	{ } { } { } { }	Permanently
Wills	{ } { } { } { }	Permanently
Death Certificate	{ } { } { } { }	Permanently
<b>Finance</b>		
Bank Account #s	{ } { } { } { }	7 Years
Loan Agreements	{ } { } { } { }	Unpaid while in force
Stocks and Bonds	{ } { } { } { }	Permanently
Pensions	{ } { } { } { }	Permanently
SBP information	{ } { } { } { }	Permanently
<b>Taxes</b>		
Past returns	{ } { } { } { }	7 Years
Cancelled checks	{ } { } { } { }	7 Years
<b>Insurance</b>		
Life Insurance	{ } { } { } { }	Permanently
Homeowners policy	{ } { } { } { }	Permanently
Auto Policy	{ } { } { } { }	New one annually
Medical	{ } { } { } { }	New one annually
<b>Real Estate</b>		
Trust Deeds	{ } { } { } { }	Permanently
Real Estate Notes	{ } { } { } { }	Permanently
Title Policy	{ } { } { } { }	Permanently
Mortgage Documents	{ } { } { } { }	Permanently
Tax Assessments	{ } { } { } { }	7 Years
<b>Medical</b>		
Records	{ } { } { } { }	Permanently
Receipts	{ } { } { } { }	1 Year
Insurance payments	{ } { } { } { }	1 Year
<b>Autos</b>		
Registration	{ } { } { } { }	Until sold
Ownership	{ } { } { } { }	Until sold
Loan/Lease Agreement	{ } { } { } { }	3 years

**H- Home      S- Safe Deposit Box      OF – Office      O -Other**

## IMPORTANT TELEPHONE NUMBERS

### **Ft. Sam Houston**

- Casualty Assistance/Mortuary Affairs (210) 221-1702/1780/1752/0051
- Survivors Assistance (210) 221-0051/1702/1780/1752
- Retirement Services Officer (210) 221-9004
- Office of Personnel Management 1(888) 767-6738
- Veterans Administration 1(800) 827-1000
- Social Security Administration 1(800) 772-1213
- ID Cards (210) 221-0415
- Legal Assistance (210) 808-0169
- Fort Sam Houston National Cemetery (210) 820-3891
- Retired Pay (London, KY) 1(800) 321-1080
- Annuity Pay (London, KY) 1(800) 435-3396
- Texas Veterans Commission (210) 221-2044
- TRICARE 1(800) 444-5445
- Wilford Hall Medical Center (210) 292-7100
- American Red Cross (210) 221-3355
- Armed Forces Services Corporation 1(888) 237-2872
- Army Emergency Relief (210) 221-1612

### **Houston Area**

- Fort Sam Houston Casualty and Mortuary Affairs
- Toll Free Number 1(800) 531-1114
- Survivor Assistance (713) 755-5243  
(Harris County Veterans Office  
1310 Prairie Street, Suite 1000)
- Legal Assistance
- ID Card 1(281)929-2277/2272/2051
- TRICARE 1(800) 444-5445
- Veterans Administration 1(800) 827-1000
- Social Security Administration 1(800) 772-1212
- Texas Veterans Commission (713) 682-2288
- Disabled American Veterans (713) 794-3665
- Houston National Cemetery (281) 447-8688
- American Red Cross (713) 313-1629