



Surviving Spouse: A Personal Inventory for Peace of Mind

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A Checklist of Items after a Death of a Veteran: A List of People to Notify, Places to Contact after the Death of a Loved One.

The time immediately following the death of a loved one can be overwhelming, with grief and bereavement complicated by a seemingly endless list of tasks. The immediate days following the death will be focused on the funeral or memorial service arrangements. Soon after, within 30 days, various financial and legal issues must be addressed. Many people find it very difficult to make sure they have taken care of everything.

The following is a list of tasks that are likely to need attention:

- For a Veteran, you may be able to get financial assistance for the funeral, burial plot, or other benefits. For information on benefits you can call the U.S. Department of Veteran Affairs at 1-800-827-1000. You may also receive information and assistance in applying for burial benefits by contacting your County Veterans Service Office (CVSO). You will need a copy of your loved one's Discharge papers (Form DD 214) to apply for these benefits.

- Obtain 10-15 copies of the Death Certificate. Speak with the Funeral Home or your County Veterans Services Office for contact information in your area.

- If your Veteran receives Social Security Benefits, notify your local Social Security office of the death, since these benefits will stop, overpayments will result in a difficult process of repayment. If you are a surviving spouse, as about your eligibility for increased benefits. Also, check on benefits that any minor children may be able to receive. You may call Social Security at 1-800-772-1213 between 7am - 7pm.

- If the Veteran was enrolled in the Servicemember's Group Life Insurance Plan (SGLI), Veteran's Group Life Insurance (VGLI), or Service-Disabled Veteran's Insurance (S-DVI), call the VA at 1-800-419-1473

- If Retired Military, the Defense Enrollment Eligibility Reporting System (DEERS) can be notified by calling 1-800-538-9552.

- If the Veteran is a military retiree, the Defense Finance and Accounting Service should be notified by calling the Retiree Casualty Section of the DFAS at 1-888-332-7411. You can also file the DFAS Form 9221 online using DFAS's Fast Form option at <https://www.dfas.mil/retiredmilitary/forms.html>. If the Veteran is also a current or retired civilian employee, the Office of Personnel Management should be notified by calling 1-888-767-6738.

- The VA should be notified depending on the benefits the Veteran was receiving or the programs the veteran was enrolled in. If the veteran was receiving disability compensation or a pension, call the Veterans Benefits Administration at 1-800-827-1000.

- If the Veteran was enrolled in a VA-sponsored life insurance policy, call the VA at 1-800-669-8477.

- A compilation of Personal Inventory of Usernames and Passwords for all pertinent information.

Below is a comprehensive list of Personal Record Keeping aiding you through the process of dealing with the loss of a loved one.

Personal and Family

- Birth Certificate
- Marriage Certificate
- Citizenship Papers
- Divorce/Separation Papers
- Adoption Papers
- Social Security Numbers/Cards
- Passports (Numbers, Expiration Dates)
- Driver's License (Number, Expiration Dates)
- Military Records

Medical

- Health Care Professionals (Names, Address/Telephone Number)
 - Physicians
 - Dentists
 - Pharmacists
 - Other Professionals
- Health Care Proxies/Living Wills
- Medications (Dosages, Purpose, Name of Prescribing Physician, Address, Telephone Number)
- Hospitals of Choice (Address and Telephone Number)
- Medicare Numbers
- Medicaid Numbers (Caseworker Numbers, Address/Telephone Number)
- Social Worker or Caseworker Names (Address/Telephone Numbers)

Financial

- Income Sources (Retirement and/or Disability Benefits, Social Security, etc.)

- Financial Assets (Institution Names, Account Numbers, Address/Telephone, Form of Ownership, Current Value)
 - Cash
 - Money Market Funds
 - Bank Accounts
 - Retirement and Pension Plans
 - Stocks
 - IRAs
 - Bonds
 - Annuities
 - Mutual Funds
 - Life Insurance (Policy Numbers, Beneficiaries)
- Real Estate (Property Addresses, Location and Deeds, Form of Ownership, Insurance, Current Value)
 - Primary Home (House Deed)
 - Investment Property
 - Vacation Home
- Other Assets (Location of Items/Titles/Documents, Form of Ownership, Insurance, Current Value)
 - Automobiles (Car Title)
 - Collectibles
 - Boats
 - Interests in Businesses
 - Inheritances
 - Mortgages
 - Notes
 - Personal Loans
 - Safety Deposit Box
 - IOUs
 - Credit Cards

Insurance

- Life
- Health
- Medigap - Supplemental Health
- Long-Term Care
- Dental
- Disability
- Homeowners/Renters
- Liability
- Automobile (For each policy list Company Name, Policy Number, and Location)

Legal

- Wills (dates of documents, Executor Names, Address/Telephone)
- Power of Attorney or Durable Powers of Attorney (Names, Including Backup, Address/Telephone)
- Advance Medical Directives
 - Durable Medical Power of Attorney
 - Health Care Proxies
 - Living Wills
- Guardianships/Conservatorships (Names, Address/Telephone)
- Trust Agreements

Other Important Contacts

- Professional Advisors other than health care (Name, Address/Telephone)
 - Attorneys
 - Insurance Agents
 - Financial Advisors

- Stockbrokers
- Bankers
- Clergy
- Accountants

- Past Employers (Company Names, Address/Telephone Numbers, Dates of Retirement, Contact Person, Employee ID Numbers)
- Close Friends and Neighbors (Names, Address/Telephone Numbers, indicate those who have keys to house, apartment, condominium)
- Service Providers (Names, Address/Telephone Numbers)
- Club Memberships, Volunteer Activities, and Senior Centers (Names, Address/Telephone Numbers)
- Landlord (Name, Address/Telephone Number)

Other Information

- Inventory of Family Historical records (Documents, Photos, Keepsakes)
- Burial Instructions (Funeral Home Location, Name of Director, whether funeral has been prepaid, cemetery plot location, organ donor instructions)
- Safe Deposit Boxes (Institution Names, Address/Telephone Numbers, location of keys and list of contents, other names on safe deposit boxes)
- Tax Records