AirForceFinalExpense

FREE CHECKLIST

Air Force veteran papers checklist for the family

Gather these before you need them

Tick each item when you have a copy, and write down where the original is kept. Two pages, one folder.

Service papers

- [ ] DD 214, or retirement orders and the last orders for each assignment
- [ ] Record of the discharge character (honorable or other)
- [ ] Retirement points statement for a Guard or Reserve member
- [ ] SBP election and the name of the beneficiary
- [ ] VA disability rating letter, if there is one
- [ ] Pre-need eligibility letter from VA, if you asked for one

Insurance papers

- [ ] SGLI or VGLI certificate and the OSGLI contact
- [ ] VALife policy, if there is one
- [ ] Every private life policy: company, policy number, beneficiary and backup
- [ ] The most recent premium notice or bank draft record
- [ ] A list of any Medicare supplement, long term care or Tricare plan

General education, not insurance, legal or tax advice. Figures are examples unless a source is named. Prices and rules vary by state and insurer.

Money papers

- [ ] Bank account the policy premium comes from
- [ ] Social Security number and a copy of the card
- [ ] Retired pay account and the date it is deposited
- [ ] Mortgage, rent and utility accounts that need a new name
- [ ] Credit cards in the veteran's name

People and places

- [ ] Funeral home chosen, with a phone number
- [ ] National or private cemetery named, with the plot or section number
- [ ] A faith leader or friend who will help with the service
- [ ] The person who will make the calls

Write it down

Where the folder is kept

Who has a copy

The funeral home we prefer

> A checklist does not file anything for you. VA, DFAS and Social Security each take their own claim after the death.

Sources

- VA: Eligibility for burial in a VA national cemetery
  www.va.gov/burials-memorials/eligibility/
- VA: Get your military service records
  www.va.gov/records/get-military-service-records/
- Social Security: Survivors benefits
  www.ssa.gov/benefits/survivors/

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