**RECOMMENDED STEPS WHEN A RETIRED SERVICE MEMBER DIES**

\_\_\_ Contact a funeral home to begin making arrangements (see Note #1)

\_\_\_ Report the death to all government agencies paying retirement and disability benefits (see Note # 2)

\_\_\_ Gather important documents (will, birth certificate, DD Form 214, insurance policies, marriage certificate, etc. (see Note # 3)

\_\_\_ Call to start applicable claims processing (see Note # 4)

\_\_\_ Determine immediate and short financial need and income sources

\_\_\_ Arrange for help, if needed, to settle financial and legal matters.

\_\_\_ Notify joint account agencies (banks credit unions, brokers, credit card, auto insurance and state registration/titles, home insurance, associations and clubs, etc.)

\_\_\_ Review you own legal documents for possible revisions or amendments (will, power of attorney, insurance policies, medical directives, etc.)

\_\_\_ Update dependent’s military identification card

**NOTES**

1. The following services and assistance are usually furnished by the funeral home
   1. Notifying the Social security Administration (SSA) (1-800-772-1213)
   2. Arranging for interment in a cemetery (including state and military cemeteries).
   3. Ordering “certified” death certificates
2. The funeral home does NOT usually notify the Defense Finance and Accounting Service (DFAS), the Department of Veterans Affairs (VA), or the US Office of Personnel OPM (Civil Service pay). You need to make sure you do not incur indebtedness by failing to notify these agencies.
   1. DFAS (<https://www.dfas.mil/retiredmilitary/survivors/Retiree-death/>, (DFAS Form 9221) or call 1-800-321-1080 or 1-888-332-7411
   2. VA: <https://va.org/reporting-a-veterans-death/> 1-888-767-6738 (1-800-827-1000 if member was receiving VA benefits)
   3. C. DEERS: <https://militaryrx.express-scripts.com/> 1-800-538-9552
3. The following are the most common documentation requirements
   1. Service member’s copies of all DD 214s. This frequently is a problem when there is a combination of officer and enlisted service, or a combination of Reserve/ Regular service.
   2. The inclusive dates and termination of all marriages by both the deceased and the spouse.
4. Give priority to notifying life insurers and any financial institutions where you can access funds quickly. Additionally, most veterans’ organizations (including your local MOAA chapter) offer assistance to help you complete applicable government forms.
   1. The Death notification to DFAS should automatically initiate action by DFAS to notify a surviving spouse if the deceased retiree elected the Survivor Benefit Plan. If you have questions call 1-800-321-1080 or 1-888-332-7411
   2. The death notification to the SSA should automatically initiate SSA action for the $255 death benefit, and notification to a surviving spouse regarding any changes to monthly Social Security benefits. If you have questions, call 1-800-SSA-1213.
   3. The VA provide government-furnished headstone/marker and burial at a national cemetery. Also, a surviving spouse may be eligible for pension benefits when a determination is made that the death is service-connected whether or not there is a financial need. If you have questions call 1-800-827-1000 or visit www.va.gov online. You may also work with a Veterans Service Organization (VSO) to help you file a service-connected claim for Dependent Indemnity Compensation (DIC).