

BENEFICIARY CHECKLIST

The following steps should be taken by the survivor of a deceased member or veteran.

1. Contact all insurance companies. They will require:
 - a. Policy Numbers, and/or;
 - b. Full name of the decedent.

2. Request approximately 10 certified copies of the Death Certificate. (Most should be in English)

3. Contact the Department of Veterans Affairs for burial payment. They will require:
 - a. Full name of the deceased
 - b. Social Security Number and Branch of Service

4. Contact the Department of Veterans Affairs for possible benefits for next of kin if the member died while on active military duty. They will require:
 - a. Certified copy of the Death Certificate
 - b. Copy of Marriage Certificate
 - c. Copies of the Birth Certificates of all dependent children

5. If the member retired from military service after September 21, 1972, contact respective branch of service for Survivors Benefit Plan (SBP). They will require:
 - a. Full name of the deceased/Copy of Death certificate
 - b. Social Security Number

6. Contact member's respective branch of service for Retired Serviceman's Family Protection Plan (RSFPP). They will require:
 - a. Full name of the deceased
 - b. Social Security Number

7. Contact nearest Social Security Office. They will require:
 - a. Certified copy of Death Certificate
 - b. Social Security Number of deceased
 - c. Social Security Numbers for spouse and dependent children
 - d. Birth Certificates for spouse and dependent children
 - e. Approximate earnings of deceased in the year of the death, and present employer's name

8. Contact veteran's present employer for possible insurance.

9. Contact your veteran's & recent employer for funds possibly due from Credit Union participation.

10. Contact Bank for possible mortgage insurance.

11. Notify all creditors of death; there may be Credit Life Insurance on installment loans.

12. Contact any fraternal organization to which the deceased may have belonged for possible life insurance.

13. Contact Civil Service if deceased was employed for more than 18 months in Civil Service.

14. Search for a Will. It may explain how the deceased wanted to disburse the funds and to determine if there are trust funds in existence.

15. Look for check stubs or any cancelled checks for payments to an insurance company. Check for securities, real estate and a safe deposit box.

16. Check for past enrollment in the Veteran's Education Assistance Program and/or payroll purchase plan for Savings Bonds.

17. If death occurred on a common carrier, survivors may be able to collect damages from the carrier (for fault or negligence) and/or insurance proceeds from the relevant travel agent/credit card issuer (no fault or negligence required).
18. If death occurred due to combat there may be federal tax breaks, both on income tax (I.R.C. ~ 1692) and estate tax (I.R.C. ~ 2201).
19. Contact DVA for information on possible state benefits, including bonuses, educational assistance, employment preferences, and tax exemptions.