

## PERSONAL AFFAIRS DOCUMENTATION TIPS

Make sure you have and quickly available the following:

- Columbia River Chapter and MOAA, Checklists.
- Any applicable Power of Attorney (e.g., Health Care Power of Attorney).
- Any Living Will or Advance Medical Directive.
- Any organ donor information and instructions.
- Health and Long-Term Care insurance policies.
- All DD Form-214s for both regular and reserve service encompassing All service time.
- Funeral and interment instructions and prepaid services.
- Location of Last Will and Testament.
- All marriage certificates, divorce or death decrees, and birth and death certificates for prior marriages of both member and current spouse.
- Birth and death certificates (and adoption papers) if applicable for children.
- Life insurance policies.

Review and ensure the following are also available:

- Beneficiary designations are current—particularly old insurance policies (e.g., Army & Air Force Mutual Aid Association).
- Documentation for disposition of property outside the probate process.
- All titles (e.g., home, secondary properties, vehicles, boats, etc.)
- Documentation of disability determinations by Service and/or Veterans Administrations.
- Copies of Service Record and medical/dental records.
- Documentation for Trusts (e.g., Revocable Living Trust)
- Passwords and safe deposit box information and keys.
- Information on all savings and checkbook accounts.
- Information on all Individual Retirement Accounts, brokerage accounts, and other financial assets
- Information on “*Survivor Contingency Bank Account.*”
- SBP information.
- Copy of latest “Retiree Account Statement” form DFAS-CL 7220/148.

Other:

- Pre-paid reservations, memberships, etc. \_\_\_\_\_
- Airline and other miles/credits, etc. \_\_\_\_\_
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**COLUMBIA RIVER CHAPTER, MOAA**

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

- Assemble the following documents (Note # 1):
  - All DD Form 214s (or PHS Form 1867)
  - Proof of status as Primary Next of Kin
  - Deceased spouse's funeral and burial instructions
  - Documentation of pre-paid funeral and burial services
- Contact a funeral home (or similar services' such as a crematorium) to begin planning final services/interment (Note # 2).
- Ensure sufficient deposit to cover 3-months' expenses are in the "personal account" for the next of kin or family representative (Note # 3).
- Notify the principal government agencies paying monthly retirement and disability pay within 24 hours of death (Note # 4).
- Report the death to all other government agencies paying retirement and disability benefits (Note # 4).
- Notify one of the Chapter officers to begin Personal Affairs assistance (Note # 5).
- Gather important information and documents (Note # 1).
- Call to start insurance and other claims processing (Note # 6).
- Notify other account agencies (Note # 7).
- Arrange for professional help, if needed, to settle estate and other financial and legal matters.
- Review your own legal documents for possible revisions or amendments (Will, power of attorney, insurance policies, medical directives, etc.).
- Update dependent's military identification card and Defense Enrollment Eligibility Reporting System (DEERS) (Note # 8).

**REMARKS, NOTES, AND CONTACTS**

**Remarks:**

- ❖ Additional information is available on the Chapter's website under the Personal Affairs tab at: <https://moaacolumbiariver.org>.
- ❖ The Chapter's Personal Affairs representative's contact information is listed on the front page of the Chapter Newsletter. Listed as either Membership Services or Personal Affairs—this information is also provided on the Chapter's website.

**Notes and Contacts:**

**# 1:** If possible, store where easily accessible and secure all essential documents that are foreseen to be needed in the first 48 hours after death by the primary next of kin (or family/legal representative). See Note # 7 for further information.

**# 2:** The best source to determine final arrangements is the deceased's own Instructions.

- If using a provider for final services, determine what is included such as notification to the Social Security Administration, arranging interment at a private or military cemetery, with military honors if desired, and ordering death certificates and a government-furnished headstone.
- The funeral home or other providers do not provide notification to government agencies paying monthly retired and disability pay.

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**Notes and Contacts (continued):**

**# 3:** A personal (not joint) account in the name of the primary next of kin should already be set up with checks and/or a debit card. Move funds before the death notice.

**# 4:**

AGENCY	PHONE	WEBSITE	REMARKS
Defense Finance & Accounting Service (DFAS)	1-800-321-1080	www.dfas.mil	
Pay & Personnel Center (USCG, NOAA, USPHS)	1-866-772-8724		
Office of Personnel Management	1-888-767-6738		
Social Security Administration (SSA)	1-800-772-1213	www.ssa.gov	
Veterans Administration (VA)	1-800-827-1000	www.va.gov	

**# 5:**

MOAA	PHONE	WEBSITE	REMARKS
Chapter Personal Affairs Representative			
Chapter Surviving Spouse Representative			
Chapter Secretary			
Chapter President			
National Headquarters	1-800-234-6622	www.moaa.org	

**# 6:** Priority should be life insurance and financial institutions which provide quick access to funds. Also:

- Notification to DFAS (see Note # 4) automatically initiates applications for any unpaid retirement and the Survivors Benefit Plan (SBP) if the deceased retiree *elected* to participate in the Plan. The retiree’s current year “Retiree Account Statement,” DFAS-CL 7220/148, list the coverage for the SBP and the arrears of pay beneficiary(ies).
- Arrangements for an appointment with the Veterans Services Office (VSO) for advice and application assistance for possible VA benefits should be made regardless of whether or not the deceased was drawing VA benefits before death.

ACTIVITY	PHONE	WEBSITE
Veterans Services Officers (VSO) of the VFW	1-360-693-7030	vfwvancouvervso@gmail.com

**# 7:** The Columbia River Chapter’s website, [www.moaacolumbiariver.org](http://www.moaacolumbiariver.org) at the Personal Affairs tab, provides further information, additional checklist details, and recommendations to assemble and organize Personal Affairs records and documents.

**# 8:** Timely updating your DEERS enrollment information for TRICARE medical and pharmacy coverage is essential to avoid disruption of these benefits. Concurrently, the Surviving Spouse needs to have the Department of Defense dependent’s ID card reissued. Usually, the DEERS update and new ID card require an appointment to do both at the same time.

ACTIVITY	PHONE	ADDRESS
Armed Forces Reserve Center	1-719-366-5403	Vancouver: 15005 NE 65 <sup>th</sup> Street
Defense Enrollment Eligibility Reporting System (DEERS)	1-800-538-9552	

[Please Notify the Chapter’s Membership Services Chairman if there is a change in listed phone numbers or websites]

**COLUMBIA RIVER CHAPTER, MOAA**

**RECOMMENDED INITIAL STEPS WHEN A SURVIVING SPOUSE DIES**

- Assemble the following documents (Note # 1):
  - Proof of status as the person to direct the disposition of remains.
  - Deceased's funeral and burial instructions
  - Documentation of pre-paid funeral and burial services
- Contact a funeral home (or similar services' such as a crematorium) to begin planning final services/interment (Note # 2).
- Ensure sufficient deposit to cover 3-months' expenses are in the "personal account" for the next of kin or family representative (Note # 3).
- Notify the principal government agencies paying monthly retirement and disability pay within 24 hours of death (Note # 4).
- Report the death to all other government agencies paying retirement and disability benefits (Note # 4).
- Notify one of the Chapter officers to begin Personal Affairs assistance (Note # 5).
- Gather important information and documents (Note # 1).
- Call to start insurance and other claims processing (Note # 6).
- Notify other account agencies (Note # 6).
- Arrange for professional help, if needed, to settle estate and other financial and legal matters.
- Return the Department of Defense military identification card and notify the Defense Enrollment Eligibility Reporting System (DEERS) (Note # 7).

**REMARKS, NOTES, AND CONTACTS**

**Remarks:**

- ❖ Additional information is available on the Chapter's website under the Personal Affairs tab at: <https://moaacolumbiariver.org>.
- ❖ The Chapter's Personal Affairs representative's contact information is listed on the front page of the Chapter Newsletter. Listed as either Membership Services or Personal Affairs—this information is also provided on the Chapter's website.

**Notes and Contacts:**

**# 1:** If possible, store where easily accessible and secure all essential documents that are foreseen to be needed in the first 48 hours after death by the primary next of kin (or family/legal representative). See Note # 7 for further information.

**# 2:** The best source to determine final arrangements is the deceased's own Instructions.

- If using a provider for final services, determine what is included such as notification to the Social Security Administration, arranging interment at a private or military cemetery, ordering death certificates.
- If a government-furnished headstone/marker is already in place, the additional inscription is coordinated with the cemetery.
- The funeral home or other providers do not provide notification to government agencies paying monthly retired and disability pay.

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**Notes and Contacts (continued):**

**# 3:** A personal (not joint) account in the name of the next of kin (or other family representative) should be considered with checks and/or a debit card. Move funds before the death notice.

**# 4:**

AGENCY	PHONE	WEBSITE	REMARKS
Defense Finance & Accounting Service (DFAS)	1-800-321-1080	www.dfas.mil	
Pay & Personnel Center (USCG, NOAA, USPHS)	1-866-772-8724		
Office of Personnel Management	1-888-767-6738		
Social Security Administration (SSA)	1-800-772-1213	www.ssa.gov	
Veterans Administration (VA)	1-800-827-1000	www.va.gov	

**# 5:**

MOAA	PHONE	WEBSITE	REMARKS
Chapter Personal Affairs Representative			
Chapter Surviving Spouse Representative			
Chapter Secretary			
Chapter President			
National Headquarters	1-800-234-6622	www.moaa.org	

**# 6:** The Columbia River Chapter's website, [www.moaacolumbiariver.org](http://www.moaacolumbiariver.org) at the Personal Affairs tab, provides further information, additional checklist details, and recommendations to assemble and organize Personal Affairs records and documents.

**# 7:** Military ID cards can be returned to any military activity. DEERS disenrollment can be initiated telephonically.

ACTIVITY	PHONE	ADDRESS
Armed Forces Reserve Center	1-719-366-5403	Vancouver: 15005 NE 65 <sup>th</sup> Street
Defense Enrollment Eligibility Reporting System (DEERS)	1-800-538-9552	

[Please Notify the Chapter's Membership Services Chairman if there is a change in listed phone numbers or websites]

**COLUMBIA RIVER CHAPTER, MOAA**  
**INFORMATION for SURVIVING SPOUSES**

**Who Is a MOAA Surviving Spouse:**

A “surviving spouse” is the widow or widower of a Military Officers Association of America (MOAA) member. There is no distinction made between spouses who were married during the MOAA member’s active or reserve service, and those spouses who married the service member after release from active duty or retirement. All surviving spouses are encouraged to participate in the Columbia River Chapter, MOAA, operations and activities.

**The Chapter’s Surviving Spouse Representative:**

The Chapter’s Surviving Spouse Representative is your key “go to” person. The Representative will help connect you with other Chapter officers and supporting resources. The Representative is also a voting member of the Chapter’s Executive Board in order to ensure that surviving spouses’ interests and concerns are addressed in a timely manner.

Some surviving spouses have not previously been active in the Chapter. The Surviving Spouse Representative is your personal advisor and friend to help introduce you to other members, and make it easy to participate to the extent you are able.

**Why the Following Information Is Important:**

The loss of a loved one can create difficult challenges for the surviving spouse. The process of settling personal affairs is complicated by the additional decisions and government-generated paperwork involved in the case of the death of a member, retired member, or veteran of the uniformed services. Both the Columbia River Chapter’s Personal Affairs and Surviving Spouses’ Representatives can help obtain information and assistance as you transition to a new phase of your life.

**What You Need to Do When a MOAA Member Spouse Dies:**

Chapter assistance should be requested as soon as possible after the death of a MOAA member. You, or a family or legal representative, should contact either the Chapter’s Chairman, Membership Services Committee (MSC), who is also the Chapter’s Personal Affairs Representative, or the Chapter’s Surviving Spouse Representative. The phone numbers are listed on the front page of the Chapter’s Newsletter, and also provided on the Chapter’s web site ([www.moaacolumbiariver.org](http://www.moaacolumbiariver.org)).

The funeral director usually makes the arrangements for any military honors and internment (including at government-operated cemeteries). You may, however, contact the Chapter’s MSC Chairman if you have questions about your government-furnished options before making a decision.

The Chapter web site includes a checklist for survivors about time-sensitive actions which need to be done following the death of a member. The Personal Affairs Representative can help you or your family representative complete the actions listed on the checklist—particularly those actions which require completion of government benefits’ forms and coordination with government agencies.

The National Headquarters of MOAA (1-(800)-234-6622) should also be notified by you or your legal representative as soon as possible after the death of your spouse. The member’s membership number can be found on the address label of MOAA’s Military Officer magazine. If you desire that the notice of passing be included in the next edition of the Military Officer, then the call must be made by the primary next-of-kin.

**MOAA and You:**

MOAA has long-recognized that survivors of active, reserve, retired, and veterans of the uniformed Services may be entitled to certain benefits and privileges earned by the service member’s service and sacrifices. MOAA is



dedicated to preserving and improving the legislation governing those benefits and privileges, and helping those eligible receive their full entitlement. Our local Chapter can also be part of your social and support community.

#### Chapter Resources to Support Survivors:

The Chapter's award-winning Newsletter, which is published about 6 times per year, is a compilation of a variety of news and information of interest to military members and spouses as well as the schedule and instructions for participating in upcoming Chapter functions. You can receive the Newsletter either via e-mail or postal service by communicating your preference to the Chapter Secretary directly, or also through the Surviving Spouse Representative. You will find additional information about the Chapter on the Chapter's website.

Semi-annually you will receive a phone call from a Chapter representative as part of the Chapter's "Keeping Connected" program. This call is made to ensure that you are receiving the Newsletter, ask if there are any questions or issues that need Chapter officers' assistance, say "hello—we are thinking of you," and update your contact information. When possible, you will have the same person calling you each time. The calls will not be made for the purpose of any solicitation. Please notify the Chairman of the MSC if you have not received a call by each June and October, or you do not want to be called.

The Chapter activities offer you an opportunity to get out and socialize with others who might share some of your interests, and have common experiences. Chapter meetings and events, except the Annual Meeting each January or February, are focused on programs and social engagement rather than the conduct of Chapter business. Chapter business is conducted at the Executive Board meetings usually held the second Thursday of each month. Surviving spouses may attend the Board meetings, but do not have a vote in these proceedings.

#### Your MOAA Membership as a Surviving Spouse:

If your deceased spouse was a national MOAA "Life Member," that life membership transfers to you at no cost as the surviving spouse upon notification of the death to the national headquarters of MOAA.

If the deceased member was not a "Life Member," a representative of the national headquarters staff can briefly explain options for national MOAA membership as a surviving spouse. Options include Life Membership, Premium Membership at a discounted annual cost, and *no cost* Basic Membership. Our Chapter requests and encourages you to have a national membership—even if at the Basic and free membership level.

Within the Columbia River Chapter, surviving spouses have full membership rights including the right to vote, hold office, and participate in all activities and events. There are no annual Chapter dues for Surviving Spouses; however, you are encouraged, when able, to be involved in the scholarship and charitable activities of the Chapter's tax-exempt *Columbia River MOAA Fund*.

#### Chapter Expectations of You as a MOAA Surviving Spouse: We hope that you will:

1. Maintain your national MOAA membership.
2. Keep us informed about any changes to your mailing and e-mail addresses, and phone number(s).
3. Participate in Chapter functions and charities to the extent you are able and comfortable.