



RETIREE PRE-PLANNING CHECKLIST

(For later use by next of kin)

As of Date: _____

Retiree Name:		SSN:		Service # (Other):	
Military Grade:	Date of Retirement:	Branch of Service:		Years of Service:	
Address		City		State	Zip Code
Date of Birth	Place of Birth	Date of Marriage		Place of Marriage	
Father's Name		Date of Birth		Place of Birth	
Mother's Name		Date of Birth		Place of Birth	

Documents Needed to Claim Death Benefits:

	Copies of applicable report(s) of separation (DD214, NGB 22, 20 Year Letter, DD Form 1883 (SBP), Statement of Service or Retirement Points)
	Copy of Retirement Orders
	Copy of Birth Certificate
	Copy of Death Certificate
	Copies of Marriage License and/or Divorce Decree (as applicable)
	Social Security Data
	VA Insurance Data
**Plus You Should Always Have the Following Documents on Hand (know the location of these documents)	
	Updated Will and/or Letter of Instruction
	Names of Banks, Credit Unions (to include account numbers)
	Updated List of Assets and Liabilities
	Insurance Policies (policy numbers, instructions, payments, etc.)
	Adoption or Naturalization Papers (if applicable)

PART I – Retirement Pay Data (if Drawing Retirement Pay)

Retiree Gross and Net Pay Data

Deduction: \$	For:	Deduction: \$	For:
Deduction: \$	For:	Deduction: \$	For:
Deduction: \$	For:	Deduction: \$	For:
Net Pay:		Tax Income:	

Keep current and/or have most recent pay statement attached to this checklist

Survivor Coverage Information

Survivor Benefit Plan (SBP) Annuity: \$	SBP Base Amount: \$
Supplemental SBP: \$	Effective: *
Retired Serviceman’s Family Protection Plan (RSFPP) Annuity: \$	(pre SBP program)

*Retiree must live for one year after election for survivors to benefit from new coverage

PART II – Social Security Data (if applicable)

Social Security Claim #:	Month Filed:
Type of Benefit(s):	Beginning Month of Entitlement:
Amount Monthly: \$	Bank Account:

PART III – Veteran’s Administration Data (if applicable)

VA Compensation: \$	Disability Claim #:	Remarks
VA Insurance Policy (VGLI) #(s):	File #:	
Type:	Amount: \$	Location of Policies
Any Known Paid-Up Addtl. VA Insurance: \$	As of Date:	
Deduction: \$	For:	Deduction: \$ For:
Other Remarks:		
Veteran’s Claim Number(s) (other):	Patients Data Card #:	

PART IV – Miscellaneous (Things to know and plan for upon death of retiree)

	Disposition Instructions for the Body (burial, cremation, memorial service, etc.)
	Information Required for Obituary Notice (names, relation and locations of relatives, etc.)
	Widows/Widowers Will Need New ID Card
	Changes in DEERS Program Will Need to be Made (TriCare)
	It May Take Several Months to Clear Estates (may need up to 8 copies of death certificate)
	Contents of Safety Deposit Box Should be Known (if applicable)
	Direct Deposit of Social Security Benefits and Military Retirement Pay Must be Immediately Changed
	Names of Beneficiaries on Insurance Policies Become Very Important (keep current)
	There May be Some Entitlement to Burial Benefits (headstone, payments, etc.)
	Check VA for Presidential Memorial Certificate
	An American Flag Can be Obtained (check VA and Post Office)
	The Survivor Should Update Their Will
	Extra Credit Cards Should be Destroyed and/or Cancelled
	Appropriate Changes Should be Made to All Joint Ownership Items
	Contact Insurance Companies as Appropriate
	Be Prepared to Turn In Retirees ID Card (where and when required)

POINTS OF CONTACT

The Nebraska Military Retiree Council	402-309-7305
Army Personnel Office (National Guard)	402-309-8162
Air Force Personnel Office (Air National Guard)	402-309-1452
Survivor Outreach Services	402-309-7466
Legal Office (Military)	402-309-8370
State TriCare Representative	402-309-1872
Funeral Honors	402-309-7339
Defense Finance & Accounting Services (DFAS) – retiree pay	1-800-321-1080