A Checklist for Survivors



When a family member dies, the last things on your mind are taxes and notifying pension-plan administrators. But even as you grieve, it's essential you begin taking steps to tie up the affairs of your loved one.

Keep this checklist on hand to refer to when dealing with a death in the family. While not exhaustive, this list is intended as a reminder for family members and surviving spouses about the many subjects that need attention at the time of death of a MOAA member.

Immediately After Death

		Veterans Affairs Office of Survivors Assistance:	
		Coast Guard Casualty Assistance: 571-266-2375	
		Department of the Air Force Casualty Assistance (Air Force and Space Force): 800-525-0102, select Option 2, then Option 1	
		Navy Casualty Assistance/Family Liaison: 800-368-3202	
		Marine Corps Casualty Assistance: 800-847-1597	
		Army Casualty Assistance: 888-ARMYHRC (276-9472)	
	Contact the service branch's casualty assistance office		
	Place obituary via a local newspaper (print and/or online) or other online outlet (your funeral director may be able to assist).		
	Contact a funeral director. Most are familiar with VA/ state cemetery procedures and can assist with military honors.		
	Call a clergyperson (if desired).		
	Tell family and friends, as well as the deceased's most recent employer (if applicable).		
	Contact the deceased's doctor to get a legal pronouncement of death.		
_	Locate account numbers (bank, retirement accounts, insurance policies, credit cards, utilities, etc) and important papers, like the service member's DD214.		
	those pertaining to funeral and burial plans.		

Within A Few Days of Death

-	Obtain death certificates; you'll need around 10 copies. The funeral home generally can get copies on your behalf.		
	Report military retiree's death and file for prorated portion of last retiree paycheck.		
	Call Defense Finance and Accounting Service (DFAS) Customer Care Center at 800-321-1080.		
	☐ Call U.S. Coast Guard Pay & Personnel Center (for Coast Guard, U.S. Public Health Service, and NOAA) at 866-722-8724.		
	You will need to file form SF 1174 with DFAS, or form CG-3867 for Coast Guard, U.S. Public Health Service, and NOAA.		
Notify accountant, tax preparer, attorney, and other professionals.			
Contact Survivor Benefit Plan (SBP) to start the a or inform of the death of an annuitant, contact th agency directly.			
	 Army, Navy, Marine Corps, Air Force, and Space Force should contact DFAS. You'll need to file a DD 2656-7, IRS W-4P, Direct Deposit SF 1199A or FMS 2231 along with a death certificate. 		
	 Coast Guard, U.S. Public Health Service, and NOAA should contact the Coast Guard Pay and Personnel Center. You'll need to file a CG 1884, IRS W-4P, Direct Deposit SF 1199A or FM 2231 		
	along with a death certificate. Reserve Component Survivor Benefit Plan (for those who are enrolled in RCSBP but not yet receiving retired pay):		
	• Army: U.S. Army Human Resources Command, 888-276-9472		
	• Marine Corps: 800-336-4649		
	 Navy: 866-827-5672 Air Force: 800-525-0102 		
	• Coast Guard: 800-772-8724		
 	Notify the VA of a beneficiary's death. If the veteran's death may have been related to a service-connected disability, contact the VA regional office at 800-827-1000.		

	 Surviving spouses may qualify for VA benefits such as burial benefits, a government-provided headstone, and tax-free Dependency and Indemnity Compensation (DIC) payments. MOAA always recommends the use of free claim and appeal services from an accredited Veterans Service Organization (VSO) when applying for VA benefits. 	Review the deceased's credit report to prevent and identify fraud. MOAA Membership for Survivors
	Report death to Social Security Administration (SSA) to apply for survivor benefit and death benefit. Contact the SSA at 800-772-1213.	Surviving spouses inherit the remaining MOAA membership of the military member. Call MOAA at (800) 234-MOAA (6622) or email msc@moaa.org
	Notify the Office of Personnel Management at 724-	to initiate this process.
	794-2005 if the deceased was a member of the Civil Service or the Federal Employee retirement systems (CSRS/FERS). For inquiries about Civil Service Survivor Benefit Plan coverage and Casualty and Federal Group Life Insurance, call 888-767-6738.	Notes and Numbers
	Contact the Defense Enrollment Eligibility Reporting System (DEERS) at 800-538-9552.	
	Notify Express Scripts, the TRICARE pharmacy contractor, at 877-363-1303 to turn off maintenance prescriptions.	
	If the deceased was a participant in the Thrift Savings Plan, contact the ThriftLine Service Center at 877-968-3778.	
	Stop using the deceased's credit cards and notify credit card companies of death.	
	Call credit bureaus to report death and request a credit freeze.	
	☐ TransUnion: 800-888-4213 ☐ Equifax: 888-548-7878 ☐ Experian: 888-397-3742	
	Contact the deceased's life insurance company.	
	Contact financial institutions, brokerage houses, and investment companies where the deceased had accounts.	Military Officers Association of America
A	s Necessary	The Military Officers Association of America (MOAA) is a non- profit military and veterans association dedicated to main-
	Review bill and autopayment schedule so payments are not missed.	taining a strong national defense and ensuring our nation keeps its commitments to currently serving, retired, and former members of the uniformed services and their fami-
	Close or memorialize the deceased's email and social media accounts.	lies and survivors. Membership is open to those who hold of have ever held a warrant or commission in any component or
	Cancel the deceased's medical appointments, subscriptions, and memberships; check recurring charges.	the Army, Marine Corps, Navy, Air Force, Space Force, Coast Guard, Public Health Service, and National Oceanic and At- mospheric Administration, and their surviving spouses.