

# 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 the death of a loved one.

## IMMEDIATELY AFTER DEATH

- Locate will and any written instructions, especially those pertaining to funeral and burial plans.
- Locate account numbers (bank, retirement accounts, insurance policies, credit cards, utilities, etc.) and important papers, like the servicemember's DD Form 214.
- Contact the deceased's doctor to get a legal pronouncement of death.
- Tell family and friends, as well as the deceased's most recent employer (if applicable).
- Call a clergyperson (if desired).
- Contact a funeral director. Most are familiar with VA/state cemetery procedures and can assist with military honors.
- Place obituary via a local newspaper (print and/or online) or other online outlet. Your funeral director may be able to assist.
- Contact the service branch's casualty assistance office.
  - Army Casualty Assistance:**  
(888) ARMYHRC (276-9472), select Option 4
  - Marine Corps Casualty Assistance:**  
(800) 847-1597
  - Navy Casualty Assistance/Family Liaison:**  
(800) 368-3202
  - Department of the Air Force Casualty Assistance (Air Force and Space Force):**  
(800) 525-0102, select Option 2, then Option 1

- Coast Guard Casualty Assistance:**  
(571) 266-2375
- Veterans Affairs Office of Survivors Assistance:**  
(800) 827-1000

## WITHIN A FEW DAYS OF DEATH

- Keep bank accounts open and leave funds in them.
- 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) 772-8724.
  - 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 to start the annuity or inform of the death of an annuitant. Contact the pay agency directly.
  - Army, Navy, Marine Corps, Air Force, and Space Force should contact DFAS.
    - You'll need to file a DD Form 2656-7, IRS W-4P, and 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, and Direct Deposit SF-1199A (or FMS-2231) along with a death certificate.
- Reserve Component Survivor Benefit Plan (for those who are enrolled in RCSBP but not yet receiving retired pay):

