

**2021 MIDDLE TN CHAPTER MOAA  
PERSONAL/FINANCIAL AFFAIRS - PLANNING AHEAD CHECKLIST REMINDER**

Annually find the time to review and update your personal and financial affairs and make sure they are organized in case someone needs to access them on your behalf. Make sure someone you trust knows where to find all of this information if necessary.

\_\_\_ For Retirees & Spouses, Obtain New Military ID cards without SSN.

\_\_\_ Personal information, full name, SSN, DOB (birth certificate if available), names of former spouses (death or divorce certificates), names of children from previous marriage or unions if applicable.

\_\_\_ Your record of Personal Affairs, full name, if retired military, retired grade, service, SSN, current home address, VA Claim # if applicable, date/type of retirement.

\_\_\_ Military Service Personnel File location.

\_\_\_ Survivor Assistance may be offered by some associations: MOAA, 1-800-234-6622, <http://www.moaa.org>; Army & Air Force Mutual Aid Association, 1-800-336-4538 or 1-703-522-3060, <http://www.aafmaa.com>, or Navy Mutual Aid Association, 1-800-628-6011 or 1-703-614-1638; contact Fort Campbell, KY base operator, 1-270-798-2151 to contact Survivor Assistance Officer if available for retirees' death.

\_\_\_ Department of Veterans Affairs, VA Claim # and/or veterans' SSN; 1-800-827-1000 (Regional VA Office for veterans' benefit information).

\_\_\_ List military and civilian professional organizations to be notified upon death.

\_\_\_ List important business and personal contacts to be notified such as close friends, former employers, personal physician, clergy, attorney, trust administrator, executor of will, financial advisor, insurance agent, banker, others.

\_\_\_ Safety deposit box or home safe location and accessibility information or points of contact with access.

\_\_\_ Personal affairs documentation: birth certificate, marriage certificate, divorce papers or death certificates (of previous spouse or immediate family members), name change documentation, military separation documents-DD 214, Record of Military Service; retirement orders, other military service specific separation documents; update wills, trusts, living wills, durable power of attorney or health care power of attorney and location of originals.

\_\_\_ Personal finance information: banks, credit unions, investment or brokerage firms, financial planners and include account numbers for checking, savings, investment/stock portfolio, credit cards, IRA/401Ks, etc. and location of these documents.

\_\_\_ Document the location of important, non-financial items such as computer files and passwords--create a "DIGITAL ESTATE PLAN" to include "ALL" accounts (Amazon, Apple iTunes, Comcast/Xfinity, Gmail, EBay, Gmail, LinkedIn, PayPal, Newspaper, etc.).

\_\_\_ Automobiles, Motor Vehicles, Yachts/Boats, etc.: make, model, year, ownership status and location of titles.

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\_\_\_ Real Estate information: include locations, appraised values, and mortgage data if applicable; list homeowner insurance policy or mortgage insurance policy information. Note deeds, tax documents, and related real estate documents' location.

\_\_\_ Life or other insurance (health, Tricare, etc.) policy information: policy numbers, policy holders, update beneficiaries as necessary, list agency points of contacts.

\_\_\_ Civilian Employee Benefits or Annuities: corporation points of contact information and location of applicable papers.

\_\_\_ Social Security Administration, 1-800-722-1213 (Social Security Survivor benefit and death benefit contact number); local numbers listed in Government blue pages.

\_\_\_ Civil Service (if member of Civil Service or Federal Employment Retirement System (CSRS or FERS); contact Office of Personnel Management (Civil Service Survivor Benefit Program {SBP}, Casualty, & Federal Group Life Insurance information), 1-888-767-6738, option #4 (death of annuitant, provide SSN or CSA number.

\_\_\_ Thrift Savings Plan (if deceased CSRS or FERS retiree in TSP, contact Federal Retirement Thrift Investment Board, 1-877-968-3778, option #3.

\_\_\_ Specify your final arrangements/wishes (Funeral and Burial Wishes):

- Local Funeral Director's name and contact information
- Specify Cemetery: National, State Veterans, Civilian, etc.
- If Cremation, specify disposition of remains
- Specify if you want military service honors
- Veterans benefits entitlements: contact regional VA using number provided above
- Specify type of service, where to be held (church, graveside, synagogue, funeral home, etc.) to include specific musical tributes or special requests
- Specify whether flowers or not and if not, in lieu of donations to what organization(s)
- Other Special Requests

\_\_\_ Info: Home Livability Consultants "A Better Nest"—Denise Becker, MSSW, Certified Aging In Place, 615-624-0954, [denise@betternest.net](mailto:denise@betternest.net) or [info@abbeternest.net](mailto:info@abbeternest.net).

\_\_\_ Info: Let's Get Moving! —offers relocation, rightsizing, decluttering, and estate sale services, [www.letsgetmoving.net](http://www.letsgetmoving.net) or email: [info@letsgetmoving.net](mailto:info@letsgetmoving.net) or call 615-599-6787

\_\_\_ Info: "Prepare To Care"—A Planning Guide for Families—[www.aarp.org/caregiving](http://www.aarp.org/caregiving)

\_\_\_ Info: Resources for Family Caregivers=[www.aarp.org/caregivers](http://www.aarp.org/caregivers)

\_\_\_ Info: Tennessee Commission on Aging and Disability: [www.tn.gov/aging](http://www.tn.gov/aging) or 1-866-836-6678

\_\_\_ Info: Veterans Administration: [www.caregiver.va.gov](http://www.caregiver.va.gov) or 1-855-260-3274

Defense Finance and Accounting Address Changed May 1, 2017, the mailing addresses for Retired and Annuitant Pay changed:

Defense Finance and Accounting Service  
U.S. Military Retired Pay  
8899 E 56th Street  
Indianapolis IN 46249-1200

Defense Finance and Accounting Service  
U.S. Military Annuitant Pay  
8899 E 56th Street  
Indianapolis IN 46249-1300

<https://www.dfas.mil/retiredmilitary.html>

This checklist is not all inconclusive but it and copies of various MOAA publications are valuable assets to your survivors upon your death or a debilitating illness. Publications obtained by calling: 1-800-234-6622, provide membership # or going to MOAA website to order: [www.moaa.org](http://www.moaa.org).

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