ArmyFinalExpense

FREE CHECKLIST

Army papers and wishes checklist (PDF)

The papers and wishes a family needs in the first week

Tick what you have. Write the numbers. Tell one person where this page is kept.

Service papers

- [ ] DD214 or other discharge papers, with a second copy held by a trusted person
- [ ] Orders showing any call up to federal active duty (Guard and Reserve)
- [ ] Retirement orders or a retirement points statement (retirees)
- [ ] A VA pre-need eligibility decision letter, if you applied
- [ ] Any VA decision letters, such as a disability rating
- [ ] Marriage certificate and photo identification for the spouse

Money and insurance

- [ ] Each life insurance policy, with the insurer's claim phone number circled
- [ ] SGLI, VGLI or VALife statement and beneficiary form
- [ ] Survivor Benefit Plan election paperwork (retirees)
- [ ] Bank, retirement pay and pension contact numbers
- [ ] Social Security numbers for the veteran and the spouse

General education, not insurance, legal or tax advice. Figures are examples unless a source is named. Prices and rules vary by state and insurer.

Wishes to write down

- [ ] National cemetery, hometown cemetery or cremation
- [ ] Military funeral honors, yes or no
- [ ] Preferred funeral home, and its itemized price list
- [ ] Who makes the calls, and a backup
- [ ] Where this page and the papers are kept

Phone numbers to write in

Funeral home

Insurance company claim line

Person who holds a copy of the DD214

VA National Cemetery Scheduling Office: 800-535-1117 (write your own notes)

> The VA says the scheduling office takes calls Monday through Friday, 8:00 a.m. to 7:30 p.m. Eastern, and that you will need the DD214 or other discharge documents.

Sources

- VA: Request military service records
  www.va.gov/records/get-military-service-records/
- VA: Schedule a burial for a Veteran or family member
  www.va.gov/burials-memorials/schedule-a-burial/
- VA: Pre-need eligibility for burial in a VA cemetery
  www.va.gov/burials-memorials/pre-need-eligibility/

Ready to see real prices? Ask for a free quote from a licensed agent.

armyfinalexpense.com/quote or call (888) 635-3511

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