



# **U. S. Coast Guard Retiree & Survivor Final Affairs Guidance**

# CG Retiree & Survivor Final Affairs Guidance – Oct 2024

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## INTRODUCTION

This document was developed because of a recognized need based upon the experience from calls to the Coast Guard National Retiree Council Help Desk. There have been survivors that found themselves at a loss as to how best to proceed in dealing with the many issues affecting them and the organizations influencing their new life after the death of a loved one.

Each of the military services has developed support programs for retirees. Some are staffed by civil servants and many by volunteers. None of the military support programs have a system to provide support after the burial of a retiree. The Coast Guard National Retiree Council believed that support for families of retirees could and should be extended. . While this guide was developed for Coast Guard retirees, the vast majority of information in the guide applies to **Department of Defense, US Public Health Service, and National Oceanic and Atmospheric Administration** retirees.

Furthermore, the Council identified several topics that could be beneficial in the survivors' journey. It is always best to prevent problems and a section on **preparing** for the inevitable passing of a retiree or spouse is included. Often overlooked is providing **care for aging** or ill retirees and the process of **grieving** after becoming a survivor. These topics are also addressed in this document.

There are many resources for any of the topics covered in this document. Families are encouraged to expand upon the resources identified herein.

This guide contains resources for issues known to occur at some stages of retirement. Every family functions differently but it is safe to say that each topic covered in this document applies to some extent to every family.

This document contains a list of contacts and beneficial resources. The resource listing is not all inclusive. You are encouraged to seek more resources including consultation with family and trusted friends.

/s/ RADM Raymond

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## Use of This Guide

This document is intended to help CG Retirees & Survivors in navigating difficult final affairs and related issues. This guide does not include all sources of help and support. You are encouraged to use other resources and to TALK with family members, clergy, hospital social workers, trusted friends, and whomever you feel may be helpful to you.

Often overlooked is **caregiving** for aging and/or ill retirees and their loved ones and the process of **grieving** after becoming a survivor. These topics are also addressed in this guide. Every family functions differently, but it is safe to say that each topic covered herein applies to some extent to every family.

**Advice:** For ease of use, efficiency, and timeliness of information, this guide relies upon many hyper links to websites both governmental and third-party. If you are not comfortable using a computer, doing internet searches, and printing and saving documents, you may become overwhelmed. Seeking assistance from family and friends who are comfortable doing computer tasks could be of great assistance.

You are strongly encouraged to provide comments concerning this guide, including suggestions for improvement of the guide. Comments may be sent to the Retiree Services Program Manager at: [Robert.C.Hinds@uscg.mil](mailto:Robert.C.Hinds@uscg.mil)

**Disclaimer:** The information provided in this guide does not, and is not intended to, constitute legal advice. Instead, all information, content, and materials available in this guide are for general informational purposes only. Information in this guide may not be the most up to date. This guide contains hyper links to other third-party websites. Such hyperlinks are only for the convenience of the reader, user, or browser; and do not constitute an endorsement of the contentment by the Coast Guard.

# PREPARING: WHAT YOU CAN DO EARLY.

## Which Documents Do You Need In Place?

When you're getting your affairs in order, it's important to prepare and organize important records and files in one place. Typically, these will include personal, financial, and health care information. This may be only the a starting place. You may have other information to add such as pets and your the name and address of your veterinarian.

### *Personal information*

- Full legal name and any other name used
- Social Security number
- Legal residence
- Date and place of birth
- Names and addresses of spouse and children
- Location of birth and death certificates and certificates of marriage, divorce, citizenship, and adoptions
- Employers and dates of employment
- Education records
- Names and phone numbers of religious contacts
- Memberships in groups and awards received
- Names and phone numbers of close friends, relatives, doctors, lawyers, and financial advisors

### *Financial information*

- Sources of income and assets (pension from your employer, IRAs, 401(k)s, interest, Certificates of Deposit, etc.)
- Social Security information, such as disability payments, and any other benefits received
- Insurance information (life, long-term care, home, car) with policy numbers and agents' names and phone numbers
- Information about any annuities
- Names of your banks and account numbers (checking, savings, credit union)
- Investment income (stocks, bonds, property) and stockbrokers' names and phone numbers
- Copy of the most recent income tax return
- Location of most up-to-date will with an original signature
- Liabilities, including property tax — what is owed, to whom, and when payments are due.
- Mortgages and debts — how and when they are paid
- Location of original deed of trust for home
- Car titles and registrations

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- Credit and debit card names and numbers
- Location of safe deposit box and key location

### *Health Care information*

- Names, addresses, and phone numbers of physicians and hospital stays
- Name and address of Nursing Homes you have resided in
- Current prescriptions (be sure to update this regularly)
- Living will
- Durable power of attorney for health care
- Copies of any medical orders or forms you have (for example, a do-not-resuscitate order)
- Health insurance information with policy and phone numbers

### *Military Information*

**Military Records** – Ensure your spouse has your **DD-214(s)** or copies. The Veterans Administration (VA) and other organizations will require a copy of your DD-214 to approve death/other benefits. To get copies of your DD-214(s):

- If you Retired On/After 1 Oct 2006 – Your DD-214(s) should be accessible in Coast Guard Primary Records Center (iPERMs) at;  
<https://iperms.mymilrecord.uscg.mil/login/>
- If you Retired prior to 1 Oct 2006 – Your DD-214(s) should be accessible at the National Personnel Records Center (NPRC), accessible at:  
[Veterans' Service Records | National Archives](#)

## Where to begin?

Organizing and systematically documenting important information is very time consuming and sometimes frustrating...it is a marathon endeavor, not a sprint. Create a schedule for gathering and documenting the information/files and stick to it. Below is a list to consider.

To make the task somewhat easier to accomplish, we offer several “templates” that will help to stay organized and to document progress. The appendices at the end of this guide contain some templates, primarily from the VA *Survivor Kit*, to assist. The templates can be printed and completed manually or completed on the computer and then printed. If these templates aren't for you, there are others listed below that you may choose from. It is not important which you choose but that you choose one and stick to it!

### VA Survivor Kit

The Department of Veterans Affairs (VA) offers a survivors and burial benefits kit as a source of pre-need planning information and record storage for Veterans and their families. The kit provides a Record of Personal Affairs and when completed identifies the location of important documents, account numbers, military discharge documents, and marital information, and burial wishes.

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<https://www.benefits.va.gov/BENEFITS/docs/VASurvivorsKit.pdf>

Additionally, there is a list of possible applications you may need with hyperlinks to retrieve the necessary forms for the VA benefits process. VA forms change periodically; current versions can be found online at: <https://www.va.gov/find-form>

### Other Useful Planning Resources:

*The American Association of Retired Persons (AARP)* offers a free Record Book for documenting everything in an estate, accessible at: <https://giftplanning.aarp.org/personal-estate-planning-kit-download>

*The Dignity Memorial Personal Planning Guide*, offered by Dignity Memorial LLC (Service Corporation International, is a network of private mortuary providers), It may be useful in documenting important information, accessible at [https://sci.my.salesforce.com/sfc/p/#U00000000YYqx/a/Do000002UkyG/bWF4KIA6do\\_A1JM5UaIOu58fJu1xEb5XQIHvMfJB62I](https://sci.my.salesforce.com/sfc/p/#U00000000YYqx/a/Do000002UkyG/bWF4KIA6do_A1JM5UaIOu58fJu1xEb5XQIHvMfJB62I)

**Navy Mutual Aid** <https://www.navymutual.org/EstatePlanning>

**Military Officers Association of America (MOAA)** <https://www.MOAA.org/>

Preparing for the Loss of a Military Spouse at <https://www.moaa.org/content/publications-and-media/moaa-publications/help-your-survivors-detail>

**National Institute on Aging**, Getting Your Affairs in Order Checklist: Documents to Prepare for the Future at <https://www.nia.nih.gov/health/advance-care-planning/getting-your-affairs-order-checklist-documents-prepare-future>

**FIVE WISHES WORKBOOK**, explaining how you want to be treated if you become seriously ill, is accessible at [https://www.dcms.uscg.mil/Portals/10/CG-1/retiree/docs/CGNRC/5%20Wishes%20Workbook 2.pdf?ver=l0Saer2TwAiTtR26wOz4dQ%3d%3d](https://www.dcms.uscg.mil/Portals/10/CG-1/retiree/docs/CGNRC/5%20Wishes%20Workbook%202.pdf?ver=l0Saer2TwAiTtR26wOz4dQ%3d%3d)

## Health Care Planning

No one ever plans to be sick or disabled. Yet, planning can make all the difference in an emergency and at the end of life. Being prepared and having important documents in a single place can give you peace of mind, help ensure your wishes are honored and ease the burden on your loved ones. The *5 Wishes Workbook* allows your family or caregiver to know exactly what you want, so they don't have to guess. Documentation of your decisions is legally valid in nearly every state.



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## Finances Are Important

**The importance of understanding family finances cannot be overstated, especially after the death of a loved one.** See informative American Association of Retired Persons (AARP) article by Suzanne Ball with real-life stories at: <https://www.aarp.org/caregiving/basics/info-2022/preparing-to-be-a-widow.html>

“Get your financial records straight” is Ms. Ball’s first piece of advice. “You really want to avoid probate. Make a file with important papers and contact information, then tell someone where it is. When the day comes, you may not be able to think.” She also recommends asking children what possessions they want and recording their choices or giving them the items straightaway. Insofar as everyday matters, Ball says, “Don’t feel guilty about things like ordering in or using services.”

Access to all financial institutions will be critical for making a smooth transition. Locations of such all-inclusive information along with contact numbers and account numbers should be shared or in a readily accessible location. Secrecy here will only delay resolving financial issues later.

**Beneficiaries:** Ensure you have up to date Beneficiary Information for all bank accounts, stock funds, IRAs, policies, Thrift Savings plans, and other retirement accounts. This list can/should be updated whenever changes to benefits are made. It would be great to have a folder with this information included with other financial information. Failure to designate beneficiaries will only delay the passing of accounts to the survivors and could drag on for an extended period.

**Banking:** This includes Certificates of Deposit, checking accounts, savings accounts, ATM cards, and debit cards.

When a bank account owner dies, the process is straightforward if the account has a joint owner or beneficiary designated. Otherwise, the account typically becomes part of the owner's estate or is eventually turned over to the state government and the disbursement of funds is handled in probate court. For this reason, all bank accounts should be joint accounts or at least have a beneficiary designated.

**Survivor Benefit Plan (SBP).** Your military spouse may have elected to enroll in the Survivor Benefit Plan (SBP) upon his/her retirement from military service. SBP is a government sponsored and supplemented life insurance plan. The status of that election is found on the member’s pay slip. If you have questions, please call the Pay and Personnel Center, Retiree and Annuitant Services Brand (PPC-RAS) at **866-877-8724**.

**Note:** **Survivors** must apply for SBP payments as well as filing for final retired pay. Forms are available in the appendices the PPC issued. See also the PPC publication, *for Survivors of USCG, USCGR, NOAA and PHS* at <https://www.dcms.uscg.mil/ppc/ras/>

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## Life Insurance

Life insurance policies should be readily available for survivors' retrieval. Many have claim forms that can be completed in advance. Doing so will make for a timely and smoother payment. Discuss this with the Life Insurance Beneficiaries. Designation of beneficiaries should be kept up to date as circumstances or desires change. Many veterans have enrolled in Veterans Group Life Insurance (VGLI) and/or other service-related life insurance companies. [Navy Mutual Aid, 5Star Life Insurance, MOAA]. Some of these organizations have excellent and free resources that can be useful, in addition to offering life insurance. Hyperlinks to service - related life insurance companies are listed below.

**Veterans Group Live Insurance (VGLI)** <https://www.va.gov/life-insurance/options-eligibility/vgli/>

**Navy Mutual Aid** <https://navymutual.org>

**5Star Life Insurance** <https://www.5starlifeinsurance.com/>

**MOAA** <https://moaa.org>

## Financial Planning

Regardless of the health of family members, a sound financial plan is always a benefit in the long term. There are Certified Financial Planners available nationwide. If you choose another method of creating financial plans, there are free websites that can be useful. Some are listed below.

**Financial tools** <https://www.aarp.org/money/get-more-tools-resources-free-registration.html>

**Financial Planning for Widowhood** <https://www.aarp.org/money/investing/info-2022/financial-plan-for-loss-of-spouse.html>

**Financial Education** *A core tenet of Navy Mutual Aid's mission is to educate members of the uniformed services, including veterans, and their families on matters of financial security. As part of our way to fulfill this mission, we maintain a Learning Center and regularly publish content that can help you live your best financial life. View our newest posts below.*

**Estate Planning:**

<https://www.navymutual.org/mutually-speaking/general/preparing-for-final-expenses/>

<https://www.navymutual.org/mutually-speaking/general/terminal-illness-how-life-insurance-can-help/>

<https://www.navymutual.org/mutually-speaking/general/what-to-do-when-a-veteran-passes-away>

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## Life Insurance:

<https://www.navy mutual.org/mutually-speaking/general/common-life-insurance-policy-strategies/>

<https://www.navy mutual.org/mutually-speaking/general/what-happens-when-a-life-insurance-policy-owner-passes-away/>

## Coast Guard Mutual Assistance

See the FREE Personal Estate Planning Kit for organizing your estate—saving you time, protecting your assets and helping you establish your legacy, at

[https://cgmahq.mylegacygift.org/personal-estate-planning-kit?utm\\_source=stl&utm\\_medium=email&utm\\_campaign=AN24&utm\\_content=&subid=235634744&seed=](https://cgmahq.mylegacygift.org/personal-estate-planning-kit?utm_source=stl&utm_medium=email&utm_campaign=AN24&utm_content=&subid=235634744&seed=)

## Coast Guard and Other Military Legal Assistance

CG legal assistance attorneys provide advice and counsel regarding personal legal issues to thousands of service members, dependents, and retirees each year at no cost. These issues involve family law, development of wills and advanced medical directives, estate planning, consumer law, landlord relations, immigration and other topics, including notaries and powers of attorney.

**Coast Guard:** [https://www.uscg.mil/Resources/Legal/Legal\\_Assistance/](https://www.uscg.mil/Resources/Legal/Legal_Assistance/)

**Other Military:** <https://www.militaryonesource.mil/financial-legal/legal/military-legal-resources-available-to-you/>

## Legal Considerations

The following list provides common documents to consider when getting your affairs in order. **Many seek the expertise of an attorney** in discussing and developing appropriate legal documents specific for their particular state, family situation, and personal desires.. Military attorneys will offer some or all of the documents discussed below.

## Plan For Your Estate

The considerations discussed below can ensure that your finances, family outcomes, and property are handled as you wish. Additionally, decisions on health care and final arrangements may be specified. Common documents are described below..

A **will** specifies how your estate. your property, money, and other assets, will be distributed and managed when you die. A will can also address care for children under age 18, adult dependents, and pets, as well as gifts and end-of-life arrangements, such as a funeral or

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memorial service and burial or cremation. If you do not have a will, your estate will be distributed according to the laws in your state.

AARP offers a guide to estate planning at <https://www.aarp.org/retirement/planning-for-retirement/info-2018/paperwork-suze-orman.html>

### Listed below are some typical documents included in Estate Plans

- **Durable power of attorney for finances** names someone who will make financial decisions for you when you are unable to do so yourself.
- **Living trust** names and instructs a person,, called the trustee,, to hold and distribute property and funds on your behalf when you are no longer able to manage your affairs.
- **Health care decisions.** Many people choose to prepare advance medical directives, which are legal documents, that provide instructions for medical care and only go into effect if you cannot communicate your own wishes due to disease or severe injury. The most common directives include a living will and a durable power of attorney for health care.
- **Living will** tells doctors how you want to be treated if you cannot make your own decisions about emergency treatment. You can specify which common medical treatments or care you would want, which ones you would want to avoid, and under which conditions each of your choices applies. Learn how to prepare a living will. Some states provide templates that may be used for this purpose.
- **Durable power of attorney for health care** names your health care proxy, a person who can make health care decisions for you, if you are unable to communicate these yourself. Your proxy — also known as a representative, surrogate, or agent — should be familiar with your values and wishes. A proxy can be chosen in addition to or instead of a living will. Having a health care proxy helps you plan for situations that cannot be foreseen, such as a serious auto accident or stroke. Appendix K contains more detailed considerations on choosing a proxy and serving as a proxy.
- **Provider Orders for Life-Sustaining Treatment (POLST)** are portable medical orders that communicate to health care facilities and providers with a patient’s wishes for end-of-life intervention, including emergency medical services (EMS). A POLST initiative seeks to use one style of form applicable across all health care settings, signed by a patient (or their surrogate) and their health care provider.

<https://www.aanp.org/advocacy/advocacy-resource/policy-briefs/issues-at-a-glance-provider-orders-for-life-sustaining-treatment-polst>

**See Appendix L for a more extensive discussion of this topic.**

### The Final Planning Steps

**Talk with involved parties.** Inform your doctors, your lawyer, your insurance provider about your documents and plans, Giving permission for your doctor or lawyer to talk with your

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caregiver is different from naming a health care proxy. A health care proxy can only make decisions if you are unable to communicate them yourself. Doing discussions in advance of a specific need will allow everyone to have copies of pertinent documents and understand the larger picture of your desires.

**Review your plans regularly.** It's important to review your plans at least once each year and when any major life event occurs, such as divorce, remarriage, move, or major change in your health.

### Need Help With Getting Your Affairs In Order?

#### See Coast Guard Legal Assistance Above

You may want to talk with a lawyer about setting up a general power of attorney, durable power of attorney, joint account, or trust. Be sure to ask about the lawyer's fees before you make an appointment.

You do not have to involve a lawyer in creating your advance directives for health care. Most states provide the forms for free, and you can complete them yourself. Additional information is accessible at <https://www.nia.nih.gov/health/advance-care-planning>

You should be able to find a directory of local lawyers on the internet or contact your local library, local bar association, or the Eldercare Locator. Your local bar association can also help you find free legal aid options your state has to offer. An informed family member may be able to help you manage some of these issues.

#### *Decisions You Can Consider In Advance.*

Getting your affairs in order can also mean making decisions about organ donation and funeral arrangements, or what you want to have happen to your body after you die. Deciding and sharing your decisions can help your loved ones during a stressful time and best ensure your wishes are understood and respected.

**Organ donation and brain donation.** When someone dies, their healthy organs and tissues may be donated to help someone else. You can register to be an organ donor when you renew your driver's license or state ID at your local department of motor vehicles. You can also register online. Some people also choose to donate their brain to advance scientific research. It may be possible to donate organs for transplant as well as the brain for scientific research. Learn more about [organ donation](#) and [brain donation](#).

**Funeral arrangements.** You can decide ahead of time what kind of funeral or memorial service you would like and where it will be held. You can also decide whether you would like to be buried or cremated and whether you want your body's ashes kept by loved ones or scattered in a favorite place. Be sure and specify certain religious, spiritual, or cultural traditions that you would like to have during your visitation, funeral, or memorial service. If you choose not to be embalmed or cremated, most states allow families to take care of transportation, preparation of

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the body, and other needed arrangements. Learn more about funeral arrangements from the website from the National Funeral Home Foundation at <https://www.homefuneralalliance.org/>

When making funeral arrangements, it is helpful to put your preferences in writing and give copies to your loved ones and, if you have one, your lawyer. The Federal Trade Commission provides wealth of information on funerals at <https://consumer.ftc.gov/articles/planning-your-own-funeral>

### Advance Care Planning and Health Care

#### Decisions: Tips for Caregivers and Families

In terms of a caregiver or family member, what matters most to your loved one can help you honor their wishes and give you peace of mind if they become too sick to make decisions. Unfortunately, only one in three people in the United States has a plan for their future health care in place. There are steps you can take to help your friend or family member navigate future medical decisions — and to be prepared to make decisions for them, if needed. This is part of <https://www.nia.nih.gov/health/advance-care-planning/advance-care-planning-advance-directives> , health-care which involves preparing for decisions about future medical care and discussing those wishes with loved ones. This NIH has advance care planning discussion at: <https://www.nia.nih.gov/health/advance-care-planning/advance-care-planning-advance-directives-health-care>

**Appendix K contains an expansion of options for your consideration from NIH.**

# CAREGIVING

### Important Caveats

Giving care to an ill family member is a huge undertaking. We have provided a wealth of resources to assist with this. **Computer literacy is a must to access the information addressed in this guide.** If you are not comfortable or are inexperienced in using a computer, it is suggested that you enlist the help of a trusted and computer savvy family member or friend to assist in taking advantage of the links embedded herein.

While there are several resources available, none of them is likely to fit your situation exactly. You are encouraged to dig deeply into the information available to broaden and even redefine your own issues,

### Selected Resources

**Coast Guard Retiree's Caregivers Guide**, a helpful, unofficial resource, at

[https://www.dcms.uscg.mil/Portals/10/CG-1/retiree/docs/pdf/CG\\_Retiree\\_Caregivers\\_Guide\\_2%20Aug%202016.pdf?ver=2018-06-19-095455-493](https://www.dcms.uscg.mil/Portals/10/CG-1/retiree/docs/pdf/CG_Retiree_Caregivers_Guide_2%20Aug%202016.pdf?ver=2018-06-19-095455-493)

**National Institute on Aging, *The Caregivers Handbook***, at

<https://order.nia.nih.gov/publication/caregivers-handbook>

**Florida State Health improvement Plan** (One State example) at

<https://safe.menlosecurity.com/doc/docview/viewer/docN05EC8F323BCBfc155a66d2d74dfe97626c47d8b8cecad0530eb2fd967c128544b92ab5966903>

**Veterans Administration (VA) Caregivers Program.** This program applies only to caregivers of veterans receiving VA Health care. Additional program features are for veterans with at least 70% disability. The VA Caregiver Support Program (CSP) offers clinical services to caregivers of eligible and covered Veterans enrolled in the VA health care system. The program's mission is to promote the health and well-being of family caregivers who care for our Nation's Veterans, through education, resources, support, and services. There is a CSP team CSP Team Locator at <https://www.va.gov/find-locations/?facilityType=health> CSP offers Primary Family Caregivers enrolled in the Program of Comprehensive Assistance for Family Caregivers (PCAFC) access to expert-led legal and financial planning services at <https://www.caregiverfinanciallegal.va.gov> Caregiver Support Line **Call 855-260-3274**

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**Veterans Crisis Line** <https://www.veteranscrisisline.net> 24/7, confidential crisis support for Veterans and their loved ones. You don't have to be enrolled in VA benefits or health care to connect,

Call 988 then 1

Text 83/8255

Chat at <https://www.veteranscrisisline.net/get-help-now/chat/>

**AARP Caregiver Support** <https://www.aarp.org/caregiving/>

AARP offers a number of useful sites to help caregivers, individuals who are recently widowed and is well worth exploring.

**The National Council on Aging.** For those who decide to stay in their home while caring for a loved one,, the National Council on Aging has a number of resources available to make this decision manageable at <https://aginginplace.org/>

**Palliative Care** [https://www.va.gov/GERIATRICS/pages/Palliative\\_Care.asp](https://www.va.gov/GERIATRICS/pages/Palliative_Care.asp)

Palliative Care uses comfort care with a focus on relieving suffering and controlling symptoms to allow normal day-to-day activities and continue to do what is most important, Palliative care aims to improve the of life – in mind, body and spirit. Palliative Care can be combined with treatment that is aimed at curing or controlling illnesses. It can be started at the time of your diagnosis and may be provided throughout the course of the illness.

***VA Geriatrics and Extended Care, Medical Foster Homes***

[https://www.va.gov/geriatrics/pages/Medical\\_Foster\\_Homes.asp](https://www.va.gov/geriatrics/pages/Medical_Foster_Homes.asp)

**Elder Care.** The Eldercare Locator is a public service of the U.S. Administration on Aging connecting people to services for older adults and their families. This locator allows people to search for a variety of topics using ZIP codes to find services nearest to them, **Call: 1 800-677-1116.**

**National Institute on Aging (NIA).** National Institute on Aging has several useful publications, including The Caregivers Handbook. All of these FREE publications can be ordered and may be ordered in Spanish at <https://order.nia.nih.gov/>

**Florida Elder Affairs Caregivers Tool Kit** (One State example) at <https://elderaffairs.org> Also contains information that is not state specific.

**VA Long Term Care** at [https://www.va.gov/geriatrics/pages/VA\\_Long\\_Term\\_Care\\_Services.asp](https://www.va.gov/geriatrics/pages/VA_Long_Term_Care_Services.asp)

**National Association of County Veterans Service Officers, NACVSO** at <https://www.nacvso.org/>

**Armed Forces Retirement Homes** (currently in two locations) at <https://www.afrh.gov/>



## CG Retiree & Survivor Final Affairs Guidance – Oct 2024

**National Resource Directory.** The NRD is a database of validated resources that supports recovery, rehabilitation, and reintegration for service members, veterans, family members, and caregivers, accessible at <https://www.nrd.gov> One of the NRD resources is the guide for **Military Caregiver Support** at <https://www.nrd.gov/misc/crdDownload> The NRD provides links to the following organizations for family and Caregiver Support at <https://www.nrd.gov/Family-Caregiver-Support>

- DoD Caregiver Resource Directory
- DoD Warrior Care
- Military One Source
- Blue Star Families
- Operation Family Caregiver
- VA Caregiver Support Program
- American Red Cross Military & Veteran Caregiver Network
- Wounded Warriors Family Support
- Child Care Aware of America

**Health** <https://www.nrd.gov/Health>

- Centers for Disease Control & Prevention
- VA Community Care
- VA Suicide Prevention
- Virtual Family Assistance Center
- Military Health System
- TRICARE
- MyHealthfinder
- MilConnect
- VA Mental Health

**Benefits & Compensation** <https://www.nrd.gov/Benefits-Compensation>

- WPS Military and Veterans Health / TRICARE For Life
- BENEFEDS | Federal Benefits Enrollment (FEDVIP, FLCIP ...
- DoD Compensation & Benefits Handbook
- Veterans Benefits Administration
- RAPIDS ID Card Office Online
- U.S. National Archives & Records Administration
- Defense Enrollment Eligibility Reporting System (DEERS)
- DoD Special Compensation for Assistance with Activities of Daily Living
- National Veterans Foundation – Veteran Service Officers (Great Resource)
- Social Security Administration
- TRICARE

## CG Retiree & Survivor Final Affairs Guidance – Oct 2024

### Hospice Care

Many hospitals and rehab centers can help set of a range of hospice care for when a patient is no longer being treated for a disease. . Hospitals often have social workers that can help with hospice. Here are some websites that may be of assistance.

#### *Routine home care*

Most common level of care in hospice. Patient is generally stable and the patient's symptoms, like pain or nausea and vomiting, are adequately controlled.

Usually provided in the home.

#### **General inpatient care**

Crisis-like level of care for short-term management of out of control patient pain and/or symptoms

Usually provided outside the home, in an inpatient setting at a medical facility like a hospital or skilled nursing facility.

#### **Continuous home care**

Crisis-like level of care for short-term management of intolerable patient pain and/or symptoms

Usually provided in the home.

#### **Respite care**

A level of temporary care provided in nursing home, hospice inpatient facility, or hospital so that a family member or friend who's the patient's caregiver can take some time off.

This level of care is tied to caregiver needs, not patient symptoms.

Level of care is one of many things to consider when choosing a hospice. Patient and caregiver needs may impact on the level of care a hospice provides. Additionally, hospices that see a small number of patients might not have patients that need a level of care besides routine home care. If you're considering a hospice that hasn't provided a level of care beyond routine home care in a 3-year period, talk to your doctor and/or hospice representative. For help having this discussion, see our suggested questions to ask when choosing a hospice.

<https://www.medicare.gov/care-compare/en/assets/resources/hospice/HospiceChecklist-Final-Clean.pdf>

**Medicare** <https://www.medicare.gov/coverage/hospice-care>

**Hospice Foundation of America** <https://hospicefoundation.org/Hospice-Care/Hospice-Services>

## UPON THE LOSS OF A LOVED ONE

### **A death at home**

Many States require you to contact the police upon a loved one's death at home. Whichever state you live in, a call to the police will start a process that will end in a certificate of death being issued. You will need many official copies.

### **A death at a hospital or hospice.**

Most people pass away at a hospital or in hospice care. They will take care of further official notifications. If a funeral home has been selected, that home should be called timely as they will need to make arrangements to take the deceased to the funeral home to commence final preparations that hopefully have been discussed and agreed to.

If your loved one died in a facility, such as a hospice, nursing home, or hospital, discuss any important customs or rituals with the staff early on, if possible. You could ask a member of your religious community or a spiritual counselor to come..

Soon after the funeral director becomes involved, funeral arrangements have been made, there are a host of parties to be informed. One person need not make all of the calls and most do not need to be made immediately. But timely notation of governmental and financial institutions should be given a high priority

**Get a Legal Pronouncement of Death.** As soon as possible, the death must be officially pronounced by someone in authority like a doctor in a hospital or nursing facility or a hospice nurse. This person also fills out the forms certifying the cause, time, and place of death. These steps will make it possible for an official death certificate to be prepared. This legal form is necessary for many reasons, including life insurance and financial and property issues.

**Make Arrangements for After Death.** If the person was in hospice care., a plan for what happens after death will already be in place. If death happens at home without hospice, try to talk with the doctor, local medical examiner (coroner), your local health department, or a funeral home representative in advance about how to proceed. You can also consider a home funeral, which is legal in most states.

Arrangements should be made to pick up the body as soon as the family is ready and according to local laws. This can be done by a funeral home or by the family themselves in most states. The hospital or nursing facility, if that is where the death took place, may help with these arrangements. If at home, you will need to contact the funeral home directly, make arrangements yourself, or ask a friend or family member to do that for you.

### **WHAT TO DO WITHIN A FEW DAYS/WEEKS OF YOUR LOVED ONE'S DEATH**

Over the first few days/weeks, you will need to notify important organizations of your loved one's death, some of which are highlighted below.

## CG Retiree & Survivor Final Affairs Guidance – Oct 2024

Coast Guard Pay & Personnel Center, Retiree & Annuitant Services (PPC-RAS) has prepared a comprehensive Survivor Guide, accessible at <https://www.dcms.uscg.mil/portals/10/cg-1/ppc/ras/survivorguide.pdf> This publication (PPCPUB 1800) should be consulted early and often. It is an excellent document and a great starting point. It covers many of the topics discussed elsewhere in this guide. There are actions to be taken that are not included in this publication and they are addressed in the following discussions.

<https://www.dcms.uscg.mil/Portals/10/CG-1/PPC/RAS/SurvivorGuide.pdf>

### Reporting a Death to PPC-RAS

Please report the passing of your loved one via e-mail to

[ppc-dg-customer@uscg.mil](mailto:ppc-dg-customer@uscg.mil)

or by phone at 1 (866) 772-8724 (business hours are: Monday - Friday 7:30 (am) to 4:00 (pm) central time).

Whether reporting a death of a Retiree, Spouse, or Annuitant receiving pay, the information needed is the same. Please provide the following information when reporting the death of a retiree, annuitant, or former spouse (who is receiving pay)

#### *Deceased Persons Information:*

1. Employee ID number or /SSN: (Note: Employee ID numbers on each pay slip)
2. Full Name:
3. Date of Death:
4. Type of death: (Natural Causes or Homicide)
5. Location of Death (City & State)
6. Type of Burial (Buried/Cremated/Sea Burial)
7. Location of burial (City & State)

#### *Reporting Person's Information*

1. Name:
2. Relationship to deceased:
3. Phone:
4. E-mail:
5. Mailing Address:

Once you have the Death Certificate, please email as scanned or other electronic copy to:

[ppc-dg-customer@uscg.mil](mailto:ppc-dg-customer@uscg.mil).

The information below is for reporting the death of a Dependent, (spouse, parent, insurable interest or child (who is not receiving pay)), Please provide the following information when reporting the death of a dependent:

1. Death Certificate (Dependent deaths cannot be processed without the death certificate)

## CG Retiree & Survivor Final Affairs Guidance – Oct 2024

2. Form CG PPC-4700 (Rev. 02/09), COAST GUARD & NOAA RETIRED PAY ACCOUNT WORKSHEET AND SURVIVOR BENEFIT PLAN ELECTION (if the person is on your Survivor Benefit Plan), A of this form copy is included in the Appendices.
3. Form CG-3867 CLAIM FOR FINAL RETIRED PAY, (if the person is listed as a Final Pay Beneficiary)

PPC RAS will contact you to confirm receipt of your report and/or supporting documents. This information will be given to the pay team who processes the passing of your loved. Provide all need information and, processing should be complete withing 30 days

**NOTE:** CG/PHS/NOAA Retirees need to report the death of their spouse or other dependent for which Survivor Benefit Program (SBP) benefit premiums are being deducted from retired pay. CG PPC will assist in suspending the SBP deductions. If the Retiree remarries, he/she must contact CG PPC.

### The Benefits of Planning

At this point you will benefit from the work in laying out personal information, financial information, and legal document discussed in the first portion of this guide. See Appendix A of this guide. If Appendix A was not completed, there are a number of hyperlinks below that will help point the way to actions needed.

**AARP** <https://www.aarp.org/home-family/friends-family/info-2020/when-loved-one-dies-checklist.htm>

**National Institute on Aging**, What to do after Someone Dies, at

<https://www.nia.nih.gov/health/grief-and-mourning/what-do-after-someone-dies>

**Consumers Report List of Actions** at <https://www.consumerreports.org/health/family/what-to-do-when-a-loved-one-dies-a3615919379/>

### Who to notify

**Social Security Administration (SSA) at 800-772-1213.** If the deceased is receiving Social Security benefits, you will need them to stop. Contact [The Social Security Administration](#) or call your local office. In most cases the Funeral Home Director, if used, will contact SSA and inform them of the individual's passing. There is a lump sum death payment also provided by SSA with the completion of their application, generally provided via telephone appointment.

**Department of Veterans Affairs.** [800-827-1000](tel:800-827-1000).

### Burial Benefits - Compensation ([va.gov](http://va.gov))

**National Cemetery Administration.** Eligible Veterans and family may apply for Pre-Need burial eligibility and burial benefits such as flags, headstones and markers at <https://www.cem.va.gov>

## CG Retiree & Survivor Final Affairs Guidance – Oct 2024

Additional helpful information is accessible at this website. The National Cemetery Administration can assist your Funeral Home Director or you in arranging for Military Funeral Honors.

**Before You Call Checklist** [https://dcms.uscg.afpims.mil/Portals/10/CG-1/retiree/docs/CGNRC/NCA\\_NCSO\\_BeforeYouCallChecklist%20\(1\).pdf?ver=V8wk2pjwitBDWDXKEy98kQ%3d%3d](https://dcms.uscg.afpims.mil/Portals/10/CG-1/retiree/docs/CGNRC/NCA_NCSO_BeforeYouCallChecklist%20(1).pdf?ver=V8wk2pjwitBDWDXKEy98kQ%3d%3d)

**Schedule at Burial for a Veteran or Family Member** <https://www.va.gov/burials-memorials/schedule-a-burial/>

### **Military Funeral Honors**

[https://www.cem.va.gov/military\\_funeral\\_honors.asp](https://www.cem.va.gov/military_funeral_honors.asp)

<https://www.militaryonesource.mil/programs/military-funeral-honors/>

**Office of Personnel Management-888-767-6738** for current civile service employees and those receiving civil service retirement.

**Survivor Benefits** <https://www.opm.gov/retirement-center/survivor-benefits/>

**Life Insurance Companies.** You will need a death certificate and policy numbers to make claims on any policies.

**Veterans Group Life Insurance. 800-419-1473**

<https://www.va.gov/life-insurance/options-eligibility/vgli/>

**Veterans Benefits Administration – Life Insurance. 800-669-8477**

<https://www.benefits.va.gov/insurance/index.asp>

**Star Life Insurance. 866-863-9753.** 5Star Life is the **Armed Forces Benefit Association (AFBA)** principal underwriter for member insurance products, [underpinning AFBA's support of our country's armed forces and first responders.](#) [Armed Forces Benefit Association \(AFBA\)](#)

**Navy Mutual Aid** <https://www.navymutual.org>

**DEERS** Updating DEERS will ensure continuity of survivor's' benefits. Call **800-538-9552**

**Medicare** for individuals enrolled in Medicare. Call **800-623-4227** <https://www.medicare.gov>

**Credit agencies.** To prevent identity theft, you will want to send copies of the death certificate to three major firms: Equifax, Experian, and TransUnion.

Equifax - <https://www.equifax.com/personal/contact-us/>

Experian - <https://www.experian.com/contact/personal-services-contacts.html>

TransUnion - <https://www.transunion.com/>

## CG Retiree & Survivor Final Affairs Guidance – Oct 2024

**Banks and Financial Institutions.** If your loved one left a list of accounts and passwords, it will be much easier to close or change accounts. You will need to present a copy of the death certificate if the person did not leave a list.

**Close social media accounts.** Some accounts may have autopay. Be sure to cancel these accounts if no longer desired.

- Facebook
- X formerly known as Twitter
- Instagram
- TikTok
- LinkedIn
- Email accounts

**The Long Blue Line** (Distributed quarterly to Coast Guard Active Duty and Reserve Members and CG/PHS/NOAA Retirees & Annuitants). To place a notice of the death of a **SPOUSE/DEPENDENT** of a retiree, notify Robert Hinds, CG Retiree Services Program Manager, at [Robert.C.Hinds@uscg.mil](mailto:Robert.C.Hinds@uscg.mil). You do not need to report the death of a retiree to Robert Hinds, as retiree death notices are collected in CG Direct Access (DA) following reporting to CG PPC.

### Organ and Brain Donation?

At some time before death or right after it, the doctor may ask about donating organs such as the heart, lungs, pancreas, kidneys, cornea, liver, and skin. Organ donation allows healthy organs from someone who died to be transplanted into living people who need them. People of any age can be organ donors.

The person who is dying may have already said that he or she would like to be an organ donor. Some States list this information on the driver's license. If not, the decision has to be made quickly. There is no cost to the donor's family for this gift of life. If the person has requested a Do Not Resuscitate (DNR) Order, as described at <https://www.nia.nih.gov/health/end-life/making-decisions-someone-end-life#issues> but wants to donate organs, he or she might have to indicate that the desire to donate supersedes the DNR. That is because it might be necessary to use machines to keep the heart beating until the medical staff is ready to remove the donated organs.

Learn more at:

**FAQs** <https://www.nia.nih.gov/health/organ-donation/frequently-asked-questions-about-organ-donation-older-adults>

**Advanced Directives** <https://www.nia.nih.gov/health/advance-care-planning/advance-care-planning-advance-directives-health-care>

## CG Retiree & Survivor Final Affairs Guidance – Oct 2024

**Brain Donation** <https://www.nia.nih.gov/health/brain-donation/brain-donation-gift-future-generations>

### Where to Find Some of the Needed Forms

The PPC website includes hyperlinks to many forms, some of which will be needed, accessible at: <https://www.dcms.uscg.mil/ppc/pd/forms/>



## TRANSITIONING FOR SURVIVORS

### Assistance With Grieving

Grieving is a natural part of life. Grieving will probably involve an entire family. Listed below are some resources that can help with the process and survivors are encouraged to try one of the organizations below or another, even if you don't think it is needed. You may find assistance from local clergy as well. Below are some starting points but there are other resources available.

Tragedy Assistance Program for Survivors (TAPS). TAPS is a well-established organization specializing in assisting survivors with coping with grief and making the transition to the new normal. In 2023, 81 new Coast Guard survivors contacted TAPS for assistance.

<https://www.taps.org/>

TAPS is a family. A family of care, compassion, and hope. We are here for you, whether you need someone to listen, a shoulder to cry on, a connection to resources, or an opportunity to remember and honor your loved one.

**WELCOME TO THE TAPS FAMILY** <https://www.taps.org/survivor>

**CALL 24/7 800-959-TAPS (8277)**

Tragedy Assistance Program for Survivors

3033 Wilson Blvd., Third Floor, Arlington, VA 22201

Toll-Free: 800.959.8277 (TAPS)

Main:202.588.8277 (TAPS)

**National Alliance for Children's Grief.** Grief is a natural and highly personalized response to a loss. Children can and do experience grief even if they are too young to understand what they are feeling and why. Grief is not something that we can take away from a child, rather, it is something that we must experience alongside and with them. <https://nacg.org/>

**Childhood Grief.** [https://nacg.org/wp-content/uploads/2022/06/About\\_Childhood\\_Grief.pdf](https://nacg.org/wp-content/uploads/2022/06/About_Childhood_Grief.pdf)

**Grief Share.** Local community support groups are available. <https://www.griefshare.org/>

A Grief Share support group is a safe, welcoming place where people understand the difficult emotions of grief. Through this 13-week group, you'll discover what to expect in the days ahead and what's "normal" in grief. Since there are no neat, orderly stages of grief, you'll learn helpful ways of coping with grief, in all its unpredictability—and gain solid support each step of the way.

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### American Association of Retired Persons (AARP) – Grieving

<https://www.aarp.org/search/?q=grieving&c=everywhere>

**Survivor Resources.** Survivor Resources provides immediate and long-term grief support for family and friends affected by suicide, homicide, overdose, or accidental death. We are a non-profit organization housed in the Minneapolis and St. Paul Police Departments. This partnership helps our team quickly get information about each case from police and the medical examiner.

<https://survivorresources.org/>

**USA.gov.** Provide links to a number of resources. <https://benefits-tool.usa.gov/death-of-a-loved-one/>

**Military OneSource.** <https://www.militaryonesource.mil/casualty-assistance/grief-support/resources/>

### Additional Resources

- **Information for Survivors of USCG, USCGR, NOAA and PHS.**  
This publication contains many of the issues you will face immediately and some that you may delay until you feel able to deal with the many forms and phone calls. Assistance from family members and close friends will likely be helpful and reassuring. Since there will be many calls, it will be helpful to create a log of calls noting names, numbers, and dates. This log will no doubt come in handy in what is a stressful time. <https://www.dcms.uscg.mil/portals/10/cg-1/ppc/ras/survivorguide.pdf>
- **CG Pay & Personnel Center, Retiree & Annuitant Services (PPC-RAS)** This website has a wealth of helpful information <https://www.dcms.uscg.mil/ppc/ras/>
- **RAPIDS – Military ID Cards** <https://idco.dmdc.osd.mil/idco/>
- **Military Officers Association of America (MOAA). 800-234-6622**  
<https://www.moaa.org/>
- **Navy Mutual Aid.** 800-628-6011 Military Life Insurance and Annuities  
<https://www.navymutual.org/>
- **Directory of Veteran Service Organizations**  
<https://veteransnavigator.org/article/63645/directory-veterans-service-organizations>
- **Veterans of Foreign Wars (VFW), National Veterans Service (NVS)** [VA Claims & Separation Benefits - VFW](#)

# CG Retiree & Survivor Final Affairs Guidance – Oct 2024

## REFERENCES - APPENDICES

### APPENDIX A -Record of Personal Affairs

Fillable form accessible at: [https://dcms.uscg.afpims.mil/Portals/10/CG-1/retiree/docs/CGNRC/VA%20Survivors%20Kit\\_Record%20of%20Personal%20Affairs.pdf?ver=KejM6gp2beLA4ZRrFVjKw%3d%3d](https://dcms.uscg.afpims.mil/Portals/10/CG-1/retiree/docs/CGNRC/VA%20Survivors%20Kit_Record%20of%20Personal%20Affairs.pdf?ver=KejM6gp2beLA4ZRrFVjKw%3d%3d)

The following is a guide to assist you in consolidating information that will be beneficial for your loved ones at the time of your passing. This information is for your personal use only and **should NOT be submitted to the VA**. Be sure to keep the following guide in a secure location, as it will contain personally identifiable information.

First Name	Middle Name	Last Name
Retired Military Grade	Branch of Service	Social Security Number
Street Address	City/State	Zip Code
Service Number	Date of Entry	Date/Type/Character of Separation from Military

#### Date and Place of Birth

City/State/Zip	Month/Day/Year
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## Parent's Information

---

Father's First Name

Father's Middle Name

Father's Last Name

---

Mother's First Name

Mother's Middle Name

Mother's Last Name

---

## Children's Information

---

Child's First Name

Child's Middle Name

Child's Last Name

---

Child's First Name

Child's Middle Name

Child's Last Name

---

Child's First Name

Child's Middle Name

Child's Last Name

---

Child's First Name

Child's Middle Name

Child's Last Name

## Your Marital History

---

Spouse's Name

Spouse's Social Security Number

Spouse's Birthdate

---

Location of Marriage (City/State/Country)

Date of Marriage

---

Spouse's Prior Name (if applicable)

Date of Prior Marriage

---

Your Total Number of Marriages

Your Spouse's Total Number of Marriages

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**Trusted Associates:** List a personal lawyer or a trusted friend who may be consulted regarding your personal or business affairs.

---

**1. First Name**

Middle Name

Last Name

---

Street Address

City/State/Zip

---

Phone Number

Email Address

---

**2. First Name**

Middle Name

Last Name

---

Street Address

City/State/Zip

---

Phone Number

Email Address

---

**3. First Name**

Middle Name

Last Name

---

Street Address

City/State/Zip

---

Phone Number

Email Address

---

**4. First Name**

Middle Name

Last Name

---

Street Address

City/State/Zip

---

Phone Number

Email Address

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**Location of Family Records:** In the open space below, to aid your family, list the physical location of important documentation and records. Documents may include birth certificates, adoption paperwork, marriage certificates, naturalization papers, divorce decrees, death certificates, tax documents, etc.

---

---

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---

## Your Will:

Do you have a will? Circle One: **YES** or **NO**

---

Location of Will

Executor's Name and Contact Information

---

Lawyer's Name and Contact Information

## Power of Attorney: (Personal, not VA assigned)

Do you have a Power of Attorney? Circle One: **YES** or **NO**

---

Name of POA

Location of Document

---

City/State/Zip

Phone Number

**Bank Accounts:** In the open space below, list your bank accounts, including the name of the financial institution, name of joint account holders, account numbers, and phone numbers.

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**Credit Cards:** In the open space below, list your credit cards, including the name and phone numbers.

---

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**Location of Important Financial Documents:** In the open space below, list the location of important financial documents, including savings bonds, stocks, mutual funds, 401K, safe deposit box location and key, etc.

**Real Estate:** If your family needs assistance with your home loan, they can contact VA at phone number: 1-877-827-3702. You do not need a VA loan to request assistance.

---

Primary Residence (address)

---

Mortgage Institution (if applicable)

Location of Physical Mortgage Note

---

Property Insurance Company

Property Insurance Policy Number

**Investment Properties:** In the open space below, list any investment properties, including the address and location of the deed/note.

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**Vehicles Owned:** List the year, make, model and vehicle ID number (VIN) for each vehicle you own.

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**Life Insurance:** Place a check mark beside the type/types of life insurance you have (check all that apply).

<input checked="" type="checkbox"/>	<b>Type of Insurance</b>
	Department of Veterans Affairs Sponsored Life Insurance
	Government Employee (Federal Employee Group Life Insurance – FEGLI)
	Private Employer Sponsored Life Insurance
	Private Life Insurance

---

**1. Insurance Company Name**

---

Control/Policy Number

Face Value (Dollars)

**Beneficiary Information:**

---

Name of Beneficiary

---

Mailing Address

Telephone Number

---

Payment Option

---

**2. Insurance Company Name**

---

## CG Retiree & Survivor Final Affairs Guidance – Oct 2024

Control/Policy Number

Face Value (Dollars)

Beneficiary Information:

---

Name of Beneficiary

---

Mailing Address

Telephone Number

---

Payment Option

---

### 3. Insurance Company Name

---

Control/Policy Number

Face Value (Dollars)

Beneficiary Information:

---

Name of Beneficiary

---

Mailing Address

Telephone Number

---

Payment Option

---

### 4. Insurance Company Name

---

Control/Policy Number

Face Value (Dollars)

Beneficiary Information:

## CG Retiree & Survivor Final Affairs Guidance – Oct 2024

---

Name of Beneficiary

---

Mailing Address

Telephone Number

---

Payment Option

---

### 5. Insurance Company Name

---

Control/Policy Number

Face Value (Dollars)

### Beneficiary Information:

---

Name of Beneficiary

---

Mailing Address

Telephone Number

---

Payment Option

**Other Insurance:** In the open space below, list any additional health, vehicle, or other insurance you have.

---

**Annuities:** Government and private.

---

Payable to (full name)

Monthly Amount

---

Street Address (include City, State, Zip)

Phone Number

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**Employer Benefits:** If employed or retired, list any survivor benefit that may be payable.

---

Employer

Survivor Benefit

---

Address (Include City, State, Zip)

Phone Number

**Membership in Organizations or Associations:** List any organizations with which you are affiliated that may assist your survivors. Also list other Veteran Service Organizations which may be of assistance.

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**Veteran Affairs Record:** Survivors should contact the VA at 1-800-827-1000 to report a death and to discontinue benefits.

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VA Claim Number (if applicable)

**Social Security:** Survivors should contact their local Social Security Administration office to see if burial benefits are available.

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Social Security Monthly Payment

Location of Social Security Administration Papers

**Retirement Pay:** Civilian and/or Military

---

Finance Center

Current Deposit Location

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Beneficiary or Any Unpaid Retired Pay Relationship Phone Number

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## Military Documents:

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Location of DD-214 (Separation Papers)

---

Location of Other Military Documents (Awards, Medical, etc.)

## Military Survivor/Casualty Assistance Officer: Active and retired military personnel.

---

Name and Location

Phone Number

## Funeral and Burial Arrangements:

---

Funeral Location

Funeral Director

---

Address

Phone Number

## Church, Clergy or Desired Officiant:

---

Clergyperson/Officiant Name

Office and/or Home Phone

---

Name of Institution/Organization Address of Institution/Organization

## For Those Who Wish to be Interred in a VA National Cemetery:

---

Date of Birth

Social Security Number

Rank/Branch of Service

---

Date of Entry into Service

Date of Separation

Service Number

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Have you applied for pre-need Eligibility? Visit [www.cem.va.gov](http://www.cem.va.gov) to learn more. Other Suggestions and Wishes: List in the space below.

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### Wishes for Burial and Funeral Service Arrangements:

---

Name of Resting Place	Phone Number
-----------------------	--------------

### Hymns, Psalms, Scriptures, Poetry, or Special Request:

---

---

### Flowers/ Memorial (in lieu of flowers):

---

---

Memorial and Remembrances

Indicate Emblem of Choice for VA Form 40-1330

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Do you have a pre-paid burial/plot? Circle One: YES or NO

Pallbearers: List pallbearers in the space below.

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## **Appendix B - Checklist of Important Documents**

The following documents may be helpful for survivors. Use the table below to check off the documents you have and provide their location: One can print and fill in manually or type responses and print when completed

<input checked="" type="checkbox"/>	<b>DOCUMENT</b>	<b>LOCATION OF DOCUMENT</b> <small>(write in location)</small>
	<b>Military Discharge Documents</b>	
	<b>Death Certificate (12 copies recommended)</b>	
	<b>Decedent’s Birth Certificate</b>	
	<b>Spouse’s Birth Certificate</b>	
	<b>Minor or Adult Children’s Birth Certificate(s)</b>	
	<b>Marriage Certificate(s)</b>	
	<b>Divorce Decree(s)</b>	
	<b>Other Important Documents</b>	

**List any other resources and organizations that can assist you:**



**CG Retiree & Survivor Final Affairs Guidance – Oct 2024**

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## APPENDIX C - Record of Personal Affairs

The following is a guide to assist you in consolidating information that will be beneficial for your loved ones at the time of your passing. This information is for your personal use only and **should NOT be submitted to the VA**. Be sure to keep the following guide in a secure location, as it will contain personally identifiable information.

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First Name	Middle Name	Last Name
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Retired Military Grade	Branch of Service	Social Security Number
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Street Address	City/State	Zip Code
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Service Number	Date of Entry	Date/Type/Character of Separation from Military
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### Date and Place of Birth

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City/State/Zip	Month/Day/Year
----------------	----------------

### Parent's Information

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Father's First Name	Father's Middle Name	Father's Last Name
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Mother's First Name	Mother's Middle Name	Mother's Last Name
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### Children's Information

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Child's First Name	Child's Middle Name	Child's Last Name
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Child's First Name	Child's Middle Name	Child's Last Name
--------------------	---------------------	-------------------

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Child's First Name	Child's Middle Name	Child's Last Name
--------------------	---------------------	-------------------

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Child's First Name    Child's Middle Name    Child's Last Name

### Your Marital History

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Spouse's Name                      Spouse's Social Security Number    Spouse's Birthdate

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Location of Marriage (City/State/Country)                      Date of Marriage

---

Spouse's Prior Name (if applicable)                      Date of Prior Marriage

---

Your Total Number of Marriages                      Your Spouse's Total Number of Marriages

**Trusted Associates:** List a personal lawyer or a trusted friend who may be consulted regarding your personal or business affairs.

---

**1. First Name**                      Middle Name                      Last Name

---

Street Address                      City/State/Zip

---

Phone Number                      Email Address

---

**2. First Name**                      Middle Name                      Last Name

---

Street Address                      City/State/Zip

---

Phone Number                      Email Address

---

**3. First Name**                      Middle Name                      Last Name

---

Street Address                      City/State/Zip

---

Phone Number                      Email Address

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**4. First Name**

Middle Name

Last Name

---

Street Address

City/State/Zip

---

Phone Number

Email Address

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**Location of Family Records:** In the open space below, to aid your family, list the physical location of important documentation and records. Documents may include birth certificates, adoption paperwork, marriage certificates, naturalization papers, divorce decrees, death certificates, tax documents, etc.

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## Appendix E – Financial Information Banking

**Bank Accounts:** In the open space below, list your bank accounts, including the name of the financial institution, name of joint account holders, account numbers, and phone numbers. Add additional lines as needed.

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**Credit/ATM/Debit Cards:** In the open space below, list your credit cards, including the name and phone numbers of issuers.

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## Appendix \* F – Other Financial Information

**Location of Important Financial Documents:** In the open space below, list the location of important financial documents, including savings bonds, stocks, mutual funds, 401K, safe deposit box location and key, etc.

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**Real Estate:** If your family needs assistance with your home loan, they can contact VA at phone number: 1-877-827-3702. You do not need a VA loan to request assistance.

---

Residences (address) [include primary and any other properties owned]

---

Mortgage Institution(s) (if applicable)	Location of Physical mortgage documents
---	---

---

Property Insurance Company	Property Insurance Policy Number
----------------------------	----------------------------------

**Investment Properties:** In the open space below, list any investment properties, including the address and location of the deed/note.

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**Vehicles Owned:** List the year, make, model and vehicle ID number (VIN) for each vehicle you own.

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**Investments:** In the open space below, list any investments such as stocks, bonds, etc., including the address and location of manager/broker. This should include both traditional and Roth Individual Retirement accounts, Thrift Savings Plan accounts and any other such accounts. Include the name of the account, account numbers, and contact information or managers/custodians.

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**Investment Properties:** In the open space below, list any investment properties, including the address and location of the deed/note.

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## **Appendix G - Insurance**

**Life Insurance:** Place a check mark beside the type/types of life insurance you have (check all that apply).

<input checked="checked" type="checkbox"/>	<b>Type of Insurance</b>
<input type="checkbox"/>	Department of Veterans Affairs Sponsored Life Insurance
<input type="checkbox"/>	Government Employee (Federal Employee Group Life Insurance – FEGLI)
<input type="checkbox"/>	Private Employer Sponsored Life Insurance
<input type="checkbox"/>	Private Life Insurance
<input type="checkbox"/>	VGLI – Veterans Group Life Insurance
<input type="checkbox"/>	Navy Mutual Aid
<input type="checkbox"/>	Military Officers Association of America

---

<b>1. Insurance Company Name</b>	Address	Telephone number
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Control/Policy Number	Face Value (Dollars)
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Name of Beneficiary	Address	Telephone number
---------------------	---------	------------------

---

Payment Option

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<b>2. Insurance Company Name</b>	Address	Telephone number
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Control/Policy Number	Face Value (Dollars)
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Name of Beneficiary	Address	Telephone number
---------------------	---------	------------------

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Type of Policy & Payment Option

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<b>3. Insurance Company Name</b>	Address	Telephone number
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Control/Policy Number	Face Value (Dollars)
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Name of Beneficiary	Address	Telephone number
---------------------	---------	------------------

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Type of Insurance & Payment Option

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<b>4. Insurance Company Name</b>	Address	Telephone number
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Control/Policy Number	Face Value (Dollars)
-----------------------	----------------------

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Name of Beneficiary	Address	Telephone number
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Payment Option

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<b>5. Insurance Company Name</b>	Address	Telephone number
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Control/Policy Number	Face Value (Dollars)
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Name of Beneficiary	Address	Telephone number
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Type of Policy & Payment Option

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**Other Insurance:** List any additional health, vehicle, or other insurance you may have.

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## Appendix – H Sources of Income

**Annuities:** Government and private. Such as Social Security, Survivor Benefit Plan, employee pension, insurance payout

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### 1. Establishment or Organization

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Payable to (full name)	Monthly Amount
------------------------	----------------

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Street Address (include City, State, Zip)	Phone Number
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### 2. Establishment or Organization

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Payable to (full name)	Monthly Amount
------------------------	----------------

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Street Address (include City, State, Zip)	Phone Number
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### 3. Establishment or Organization

---

Payable to (full name)	Monthly Amount
------------------------	----------------

---

Street Address (include City, State, Zip)	Phone Number
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**Employer Benefits:** If employed or retired, list any survivor benefit that may be payable. List all

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Employer	Survivor Benefit
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Address (Include City, State, Zip)	Phone Number
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## Appendix I – Other Documents

### Membership in Organizations or Associations

List any organizations with which you are affiliated that may assist your survivors. Also list other Veteran Service Organizations which may be of assistance.

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Veteran Affairs Record: Survivors should contact the VA at 1-800-827-1000 to report a death and to discontinue benefits.

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VA Claim Number (if applicable)

**Social Security:** Survivors should contact their local Social Security Administration office to see if burial benefits are available.

---

Social Security Monthly Payment

Location of Social Security Administration Papers

### Retirement Pay: Civilian and/or Military

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Finance Center

Current Deposit Location

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Beneficiary or Any Unpaid Retired Pay Relationship Phone Number

### Military Documents:

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Location of DD-214 (Separation Papers)

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Location of Other Military Documents (Awards, Medical, etc.)

**Military Survivor/Casualty Assistance Officer:** Active and retired military personnel.

Name	Location	Telephone number
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## Appendix J – Funeral and Burial Arrangements

Funeral and Burial Arrangements:

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Funeral Location

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Address

Church, Clergy or Desired Officiant:

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Clergyperson/Officiant Name

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Phone Number

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Funeral Director

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Phone Number

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Office and/or Home Phone

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Name of Institution/Organization Address of Institution/Organization

**For Those Who Wish to be Interred in a VA National Cemetery:**

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Date of Birth	Social Security Number	Rank/Branch of Service
---------------	------------------------	------------------------

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Date of Entry into Service	Date of Separation	Service Number
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**Have you applied for pre-need Eligibility? Visit [www.cem.va.gov](http://www.cem.va.gov) to learn more.** Other Suggestions and Wishes: List in the space below.

---

**Wishes for Burial and Funeral Service Arrangements:**

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Name of Resting Place	Phone Number
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**Hymns, Psalms, Scriptures, Poetry, or Special Request:**

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**Flowers/ Memorial (in lieu of flowers):**

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**Memorial and Remembrances**

**Indicate Emblem of Choice for VA Form 40-1330**

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**Do you have a pre-paid burial/plot? Circle One: YES      or      NO**

**Pallbearers: List pallbearers in the space below.**

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**Special Instructions: List any additional instructions in the space below.**

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**Obituary Biography: Write in the space below. (Suggest also typing in separate document)**

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Additional Consideration: Please Ensure the following are conducted through proper legal channels

- **Do you have a “Do Not Resuscitate” (DNR) order?**                    Circle One: **YES**    or    **NO**
  
- **Do you have a Living Will/ Health Directive?**                    Circle One: **YES**    or    **NO**

## Appendix K – Advance Care Considerations

### How to start the conversation about advance care planning

One of the best things you can do as a caregiver is to discuss your loved one's care and treatment preferences in advance. Starting the conversation early is especially important if the person has been diagnosed with a condition that affects their cognitive health, such as Alzheimer's disease or another form of dementia. Here are some ways you might start the conversation, The National Institute on Aging offers advice on becoming a health care proxy.

- Start simple. Talking about specific medical treatments or decisions can be scary and overwhelming. Instead, try asking about any concerns they may have, what decisions they may need to make, and who they might trust to make decisions for them.
- Share what's important to you. Your loved one may feel more comfortable discussing their preferences if you talk about what matters to you, as well.
- Remind them why it's important. Talk about the benefits of having these conversations and creating an advance care plan. By documenting their wishes, they are more likely to get the care they want, and it can also help loved ones feel less burden, guilt, and depression.
- Try to be understanding. After a recent diagnosis or health change, it can be overwhelming and difficult to discuss future health care needs. The person may feel more comfortable talking with someone else such as a doctor or someone in their spiritual community. You can also encourage the person to think about their potential needs and plan to discuss them another time.
- Keep the conversation going. Listen carefully to what the person says and encourage them to continue sharing.
- Provide information. If the person is open to creating an advance care plan, you can provide them information on, how to get started. It's possible your loved one may not want to put a plan in place. Still, talking to them about their preferences can help you prepare for future decisions. You may also be able to help prepare in other ways, for example by getting important papers in order.

### *How to serve as a health care proxy*

- Most people ask a close friend or family member to be their health care proxy. A health care proxy is typically responsible for talking with doctors and making decisions about tests, procedures, and treatments if a person is unable to speak for themselves. The types of decisions a proxy can make should be outlined clearly in the durable power of attorney for health care, a legal document that names the proxy.
- If someone has asked you to be their health care proxy, it's important to consider whether the role is right for you. You may have to discuss sensitive topics, make difficult decisions, and advocate on the person's behalf. Ask yourself:

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- Can I honor this person's wishes and values about life, health, health care, and dying? Sometimes this can be challenging if your values are not the same.
- Am I comfortable advocating for the person's behalf? It's okay if you don't know much about health care, but it's important that you are willing to ask questions and stand up for the person.
- Are you comfortable dealing with conflict? A proxy may need to uphold the person's wishes even if other family members, friends, or loved ones don't agree.

If you have agreed to be someone's health care proxy, consider these tips:

- Talk to the person about their values. Learn what matters most to them when it comes to life, health care, and dying.
- Learn about their current and future health concerns. The more you understand their wishes, the more prepared you will be to make decisions for them when the time comes. Ask if they have any plans in place, such as a living will; discuss these documents.
- Ask for a copy of their advance directives. This often includes a living will and durable power of attorney for health care forms.
- Keep a copy of important information. Make sure to have contact information for the health care providers and family members.
- Ask about other considerations. For example, is there anyone other than the medical team that you should talk with when making decisions? Are there spiritual, cultural, or religious traditions the person wants you to consider?
- Continue the conversation. Jointly review wishes periodically, This is especially true when major life changes occur, such as divorce, marriage, the passing of a loved one, or changes in health. Even when health care decisions are written and have discussed the decisions there may still be difficult choices Try to reflect on your discussions and do your best to honor the person's wishes.

<https://www.nia.nih.gov/health/advance-care-planning/choosing-health-care-proxy>

The National Institute on Health offers guidance for those who have agreed to serve as a health care proxy

<https://www.nia.nih.gov/health/advance-care-planning/choosing-health-care-proxy>

### **What to do when your loved one can no longer make decisions**

If your loved one can no longer make their own decisions, you may need to make decisions on their behalf. This can be difficult if you haven't already discussed their preferences. Even if you have, there may be unexpected situations and decisions that arise. Talking with close loved

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ones and the person's health care team can help you prepare and feel more supported when decisions arise. Try to:

- Talk with family members, friends, or others who know the person well.
- Think about how the person lived their life. What values and wishes did they express in the past? What did they find most meaningful in life?
- Talk with the doctor and health care team about what to expect and the types of decisions you may need to make.

### Tips for navigating the health care system

#### Americans Challenges with Health Care Costs <https://www.kff.org/health-costs/issue-brief/americans-challenges-with-health-care-costs/>

For many years, KFF polling has found that the high cost of health care is a burden on U.S. families, and that health care costs factor into decisions about insurance coverage and care seeking. These costs and the prospect of unexpected medical bills also rank as the top financial worries for adults and their families, and recent polling shows <https://www.kff.org/from-drew-altman/why-affordability-is-the-big-tent/shows> that lowering out-of-pocket health care costs is by and large the public's top health care priority.

When a person becomes too sick to make decisions for themselves, family members and caregivers may need to navigate the health care system and find ways to advocate for their loved one's care — especially if a proxy was not named. Use these tips:

- **Ask questions.** If you are unclear about something you are told, don't be afraid to ask the doctor or nurse to repeat it or to say it another way.
- **Make the person's wishes clear.** Share copies of the person's advance directives and the proxy's contact information with the health care team, nursing home staff, or others caring for the person. If the person is still living at home, you can put this information in a colorful envelope near their bed or on the fridge for emergency responders.

### See Provider Orders for Life-sustaining Treatment (POLST) in Appendix L

- **Write down contact information.** Ask for a specific person on the medical team that you can contact for questions or if the person needs something.
- **Choose one person to make health care choices.** Deciding on a main point of contact for the medical team can help everyone stay more

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organized, coordinate upcoming appointments, and manage medications or changing medical needs.

- **Keep family members looped in.** Even with one person named as the decision-maker, it is a good idea to have your family agree on the care plan, if possible. If you can't agree, you might consider working with a mediator, a person trained to bring people with different opinions to a common decision.
- **Try to decide on an end-of-life approach.** When it becomes clear the person is nearing the end of life, the family should try to discuss the desired end-of-life care approach with the health care team. This might include [hospice care](#). Discussing the options and making decisions as early as possible can help with planning.

**Note:** Palliative care is a broad approach to care that focuses on improving quality of life and managing symptoms for people with serious illnesses. Palliative care can be provided at any stage of an illness and can be used alongside curative treatment. Palliative care is the umbrella, and hospice is a specific type of palliative care.

- **Remind the health care team who the person is.** Remind them that the person is not just a patient. Tell them about the person. Share what they were like, discuss the things they enjoyed most, and post pictures in their room.

There may also be people in your community who can help you navigate the health care system. Some hospitals have a patient advocate or care navigator, or you may consider working with a [geriatric care manager](#).

### Advance Care Planning Worksheets.

Advance care planning worksheets from NIA can help you discuss and prepare for the future. You can download, print, and copy the worksheets, which are accessible at: [Advance Care Planning Worksheets](#)

## Appendix L - Provider Orders for Life-Sustaining Treatment

The goal of POLST is to ensure that patient wishes are known and honored by health care providers, including EMS personnel. POLST is a complement to, but does not replace, advance directives. POLST is appropriate for patients at increased risk of a life-threatening clinical event because they have a serious life-limiting medical condition, which may include advanced frailty.

POLST provides additional specificity about the types of treatments and interventions these patients may wish to receive or avoid. The form requires the signature of both the health care provider and the patient (or their surrogate) to be a valid portable medical order. The patient (or surrogate decision-maker) must agree to have a POLST form. POLST forms are voluntary — it is always the patient's choice whether to have one or not.

In addition to honoring a patient's wishes for their course of treatment, the majority of states have modernized POLST programs to ensure continuity of care by honoring the patient's choice of clinician on the form itself.

<https://www.aanp.org/advocacy/advocacy-resource/policy-briefs/issues-at-a-glance-provider-orders-for-life-sustaining-treatment-polst>

The American Association of Nurse Practitioners® (AANP) uses POLST as the association's standard terminology, although these initiatives may be referred to in a state by a similar variation:

- POLST or POST (physician/provider orders for life-sustaining treatment).
- MOLST (medical orders for life-sustaining treatment).
- COLST (clinician orders for life-sustaining treatment).
- MOST (medical order for scope of treatment)

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### Appendix M - Forms

The PPC website includes hyperlinks to many forms, some of which will be needed. See them at:

<https://www.dcms.uscg.mil/ppc/pd/forms/>

Forms that will likely be needed are included in the following pages. We have made these so that they can be filled out manually. Some of the forms can be accessed from the hyperlink above and completed digitally as Portable Document Forms (PDF).

Request for Annuity (SBP Benefits)

The following 2 pages include a replica generated to provide a template for completing CG Form 1884 APPLICATION FOR ANNUITY UNDER THE SURVIVOR BENEFIT PLAN

**For a fillable PDF form** of **CG Form 1884**. see the hyperlink below. Using the hyperlink the form can be completed online and printed. Alternately it can be printed and completed manually. Lastly, the form included below can be filled out manually or by

Micro Soft Word,

[https://media.defense.gov/2022/Mar/08/2002952227/-1/-1/0/CG\\_1884.PDF](https://media.defense.gov/2022/Mar/08/2002952227/-1/-1/0/CG_1884.PDF)

Directions for completing the form are included on page 22 of the publication *Information for Survivors of USCG, USCGR, NOA, and PHS (PPCPUB 1800)*

<https://www.dcms.uscg.mil/Portals/10/CG-1/PPC/RAS/SurvivorGuide.pdf>

The second form is **CG-PPC-4700** which may be found at

<https://www.corpscpc.noaa.gov/perservices/pdf/PPC4700.pdf>

As with the previous document, the same options apply for completion.

Final Retired Pay may be requested using form **CG 3687**. A fillable form is accessible at:

<https://www.dcms.uscg.mil/Portals/10/CG-1/PPC/FORMS/CLAIM%20FOR%20FINAL%20RETIRED%20PAY.pdf?ver=j-nmbEWU4hZxYjB4XFAtlw%3d%3d&timestamp=1652380296876>



### Appendix N - Acknowledgement

**2017 CG National Retiree Council (CGNRC) Meeting** – The CGNRC identified the following priority and action item in their annual report to the Commandant (CCG).

**Priority:** Increase Retiree & Annuitant knowledge of Casualty & Decedent Affairs and Benefits.

**Action:** Assess Retiree & Annuitant knowledge of Casualty & Decedent Affairs and Benefits based on CG National Retiree Help Desk reports, input from Regional Retiree Councils, Retirees, and Survivors, and existing communication tools.

**2023 CGNRC Meeting** - The Council discussed historical data relative to the action item above, agreed that many retirees & survivors have insufficient knowledge of final affairs, and existing communication tools need to be improved. Survivors continue to report being ill-prepared, particularly during the first days/weeks of spouse's passing, to manage important final affairs and transition to the next chapter of life. The CGNRC identified the following action item as a top priority in their annual report to CCG.

**Action: Develop a CG Retiree & Survivors Final Affairs Desk Reference, including the following topics and needed checklists:**

Items to be addressed prior to a retiree's death (planning/preparation).

Actions to be taken upon a retiree's death (first days/weeks).

Subsequent affairs (grieving and transitioning to the next chapter of life)

CAPT Mike Rosecrans, USCG (Ret), CGNRC member, and NRHD watch-stander, stepped-up to lead this effort, conducting extensive literature review, researching best-practices of other military services, talking directly with survivors, and partnering with Bob Hinds, CG Retiree Services, in development of a draft publication.

**2024 CGNRC Meeting (at CG PPC)** – Mike Rosecrans presented draft *CG Retiree & Survivor Final Affairs Desk Reference* to meeting participants, including RADM Michael (Joe) Raymond, Assistant Commandant for Military Personnel (CG-1M); CAPT John Henry CO PPC) and staff; Bob Hinds, CG Retiree Services (CG-1M13); and CGNRC members Lula Carpenter (Annuitant-at-Large), SCPO Charlie Womack, USCG (Ret.), CPOA/Gulf Coast Regional Retiree Council (RRC), and representatives from 17 RRCs. RADM Raymond recalled the difficulties his mother experienced during the loss of his father, a military retiree, and his own challenges in helping manage their final affairs. All meeting participants agreed the desk reference should be formalized and made available to the retiree community. RADM Raymond shared that he would be sponsoring the effort in partnership with PPC and the CGNRC. Meeting participants then agreed on a timeline for further review, development, and submission of the draft desk reference to RADM Raymond for approval.