

Web sites that might be helpful:

www.financialhelpforseniors.net

www.careinhomes.com

www.seniorcareforveterans.com

[www.governmentgrantsfor
elderly&disabledpeople.com](http://www.governmentgrantsfor
elderly&disabledpeople.com)

[www.oregon.gov/dcbs/insurance/gethelp/
healthpages](http://www.oregon.gov/dcbs/insurance/gethelp/
healthpages)

www.ssa.gov/retire

www.dmv.odot.state.or.us

Sigma Nu
Delta Tau
Alumni Chapter



**Survivor
Bereavement
Checklist**

*Please contact our
Alumni Survivor/Bereavement Officer
for further assistance.*

www.sigmanuosu.org

**Alumni Section
Password: 1917**

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Love, Honor, Truth

*This checklist is not intended as a definitive
guide. Rather, it is an aid to the family to
help prepare for events that occur before/
during/after the loss of a loved one.*

Alumni Brother,

If you have estate and other personal affairs well taken care of, wonderful! If not, then this pamphlet may help.

Spouse or Significant Other,

If the recently deceased alumni brother did not have estate and personal affair planning complete, then this pamphlet will be of assistance to you.

1. Is there a current will and/or trust and is there power of attorney designation for daily financial matters?
2. Are there advanced directives for health care and who is named as the health care representative? Is there a power of attorney for health care expense liability?
3. Is there a safe deposit box and who has access to it?
4. What financial institutions/estate planning services and credit cards are used?
5. Is there a family lawyer and is there an accountant/CPA or tax preparer?
6. Are there insurance policies and for what?
7. Is there an outstanding mortgage and who are the beneficiaries on the title? Is there a prenuptial agreement that might be involved?
8. Are there titles to estate items other than the house, and who would have beneficiary designation?
9. Does the loved one have a health care provider that can provide evidence of

disability for social security or Oregon Health Plan purposes?

10. Where would important family documents and jewelry be located if not in the safe deposit box?

11. Remember, State Department of Motor Vehicles and city, county, and state property offices must be contacted.

12. Has there been affiliation with fraternal or professional organizations, i.e.: Sigma Nu, OSU, AARP, American Legion, Disabled Vets, or Military Officers Association?

If a loved one is a veteran with a DD Form 214 discharge, or was a Civil Service employee, then the following information will be helpful.

1. Military Casualty Affairs Office (CAO).

To determine which one is closest to you, please phone 1-800-433-0048 (USAF), 1-888-276-9472 (Army), 1-800-368-3202 (Navy), 1-800-847-1597 (Marines), or 1-757-398-6765 (Coast Guard). The CAO will provide complete guidance and assistance to you in notifying the proper agencies and other actions necessary.

2. Civil Service. If the retiree was a member of the Civil Service Retirement System (CSRS) or Federal Employee Retirement System (FERS) after military retirement, notify the Office of Personnel Management (OMB) at 1-724-795-2005. (Civil Service SBP Casualty and Federal Group Life Insurance inquiries, call toll free at 1-888-767-6738.)

3. The Department of Veterans Affairs.

Contact telephone number: 1-800-827-1000. If the cause of death is related, in whole or part, to military service, you may qualify in whole or part to a military service. You may qualify for VA benefits such as burial, application for headstone, and dependence and indemnity compensation (DIC) payments.

4. Survivor Benefit Plan / Retired Servicemen Family Protection Plan / Survivor Benefit Plan (SBP/RSFPP/SSBP).

Contact telephone: 1-800-321-1080. In order to start annuity application and application for residual retired pay process, you should notify the office above of the death of the service member.

5. Reserve Component Survivor Benefit Plan (RCSBP) for Reservists.

Contact telephone number: 1-888-332-7411. For survivors of Reservists and National Guardsmen who are enrolled in the Reserve Component Survivor Benefit Plan Program but not yet receiving military retirement pay.

6. The Defense Finance and Accounting addresses changed 1 May 2017.

Go to www.dfas.mil/retiredmilitary.html for additional information.

(Retired Pay) Defense Finance and Accounting Service, U.S. Military Pay, 8899 E. 56th St., Indianapolis, IN 46249-1300. Telephone number: 1-800-558-1404.

