



SURVIVOR OUTREACH SERVICES OKLAHOMA

918-279-7401 - Broken Arrow, OK
405-228-5552 - Oklahoma City, OK
580-442-4282 - Lawton, OK

CHECKLIST FOR RETIREE SURVIVORS

1. Contact **Fort Sill Casualty Assistance Center (CAC): 580-442-8592**
(Funeral home may do this to help assist with the Funeral Honors coordination)

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2. **DFAS 9221, Report Retiree's Death to DFAS:** Can be done online with DFAS's Online Fast Forms. Contact your Support Coordinator for assistance.
<http://www.dfas.mil/dfas/retiredmilitary/forms.html>

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3. **SF 1174, Request for Final Retirement Pay:** Follow instructions of the form. If the CAC does not send you this form, you can obtain it from you Support Coordinator or the following link: <http://www.dfas.mil/dfas/retiredmilitary/forms.html>
 - a. **Need: Death Certificate**

NOTES: _____

4. **DD 2656-7, Verification for Survivor Annuity:** Establishes the Survivor Benefit Plan (SBP) after the passing of the Retiree. Contact your Support Coordinator for assistance.
 - a. **SBP Contribution:** Check the last pension pay stub; look in the deductions column for SBP. If it is there this form is required.

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5. **VA 21-530, Burial and Funeral Reimbursement:** Requests Burial and Funeral Allowance of \$300. If service connected, could be more. Follow instructions of the form. If the CAC does not send you this form, you can obtain it from you Support Coordinator or the following link: http://www.va.gov/opa/publications/benefits_book/benefits_chap08.asp

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6. **Social Security: 1-800-772-1213** Visit your local Social Security Office to report your Service member's death. Have a copy of the death certificate with you. *The Social Security Administration reports all Service member's deaths to the Veterans Department so no need to do this.

a. **Need: Death Certificate**

b. **Create my Social Security Account:** <http://www.ssa.gov/>

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7. **TRICARE: 1-866-773-0404** If on TRICARE for Life, call to report the Service member's death.

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8. **ID Card Change:** Visit a DEERS office on your nearest military installation to have the status of your ID card changed.

a. **Need:** Current Military ID Card & Second form of picture ID

b. **Need:** Marriage Certificate

c. **Need:** Death Certificate

d. **Need:** DD 214

e. Make an appointment online at: <https://rapids-appointments.dmdc.osd.mil/> or contact your Support Coordinator for assistance.

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9. **Military Records:** To request the Service member's medical records, military records, all DD214s or replacement medals visit <http://www.archives.gov/veterans/> or fill out SF180 and mail in according to instructions on form.

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10. **Thrift Savings Plan / Retirement Plans / IRAs:** If you are the beneficiary of any of these, contact your local Support Coordinator who can get you in touch with a Financial Counselor to help guide you in converting or cashing out, whatever meets your needs.

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THINGS TO REMEMBER:

You should be locating: Current Will; Insurance Policies; Birth Certificates; Marriage Certificates; Divorce Decrees; Bank Account statements (Some financial institutions carry small life insurance policies for the account holder); Safety Deposit Box info or key; Investment portfolios or statements; Prior year Tax forms; Private Organization Memberships (some carry small life insurance policies as a benefit of membership).

NOTES: _____

**WE ARE ALWAYS HAPPY TO ASSIST IN ANY WAY POSSIBLE.
PLEASE DON'T HESITATE TO CONTACT US SHOULD YOU HAVE ANY QUESTIONS.**

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Never Forgotten... Never Alone...