

Survivor Call Sheet

Palm Beach-Martin Counties Chapter | Keep this page at the front of your planning file

DFAS Retired & Annuitant Pay

800-321-1080

Report a military retiree's death; ask about final pay and SBP.

<https://www.dfas.mil/retdeath>

MOAA Member Service Center

800-234-6622 | 703-549-2311

Request survivor guidance; update membership. Email: msc@moaa.org

<https://www.moaa.org/content/about-moaa/contact-moaa/>

VA National Cemetery Scheduling

800-535-1117

Ask about scheduling burial; have discharge and pre-need records ready.

<https://www.va.gov/burials-memorials/>

VA Benefits Hotline

800-827-1000

Ask about applicable survivor, burial and benefit matters.

<https://www.va.gov/burials-memorials/>

VA Headstones & Markers

800-697-6947

Ask about headstones, markers and memorial items.

<https://www.va.gov/burials-memorials/>

Social Security Administration

800-772-1213 | TTY 800-325-0778

Confirm the death report and ask about survivor benefits.

<https://www.ssa.gov/personal-record/when-someone-dies>

Marine Corps Funeral Honors

866-826-3628

Marine service: request honors with proof of honorable service.

<https://www.hqmc.marines.mil/Agencies/Casualty-MFPC/Funeral-Honors/>

Military OneSource

800-342-9647

Military information and referral; confirm eligibility for services.

<https://www.militaryonesource.mil/contact-us/>

Other service branches: ask your funeral director to arrange the appropriate honors contact.

Marine Corps honors email: HQMC.Funeral.Honors@USMC.mil

Chapter support: moaapalmbeach@gmail.com

Your Local Contacts

Fill in names, telephone numbers and arrangements before your family needs them

Chosen funeral home / director

Cemetery / plot office / prearranged burial contact

Clergy / faith community / celebrant

Primary family contact

Alternate family contact

Attorney / executor / personal representative

Accountant / financial advisor

Insurance / other important contact

Have discharge papers, pre-need decisions and relevant policy records available.
Give sensitive identifiers only to the appropriate agency through its secure process.

Survivor Planning Checklist

Palm Beach-Martin Counties Chapter | MOAA

1. Family contacts and instructions

Download first, then type in the fields or print and complete by hand. Save your completed copy.

Keep your completed copy privately with trusted family. Nothing is submitted to the chapter.

Record document locations. Do not put passwords, full account numbers or Social Security numbers here.

Full legal name

Date this checklist was reviewed

Primary family contact and telephone

Alternate family contact and telephone

Executor / personal representative and contact

Attorney / law firm and contact

Clergy / faith community and contact

Where this completed checklist is kept

Who has a copy and how they can access it

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2. Military service and essential records

Use dropdowns where provided; type a custom answer if needed. NOAA Corps and USPHS included.

Primary uniformed service	Rank / other services served

DD214 / discharge papers: location or custodian

Retirement orders and pay records: location

SBP election / survivor coverage: records location

Arrears of pay / beneficiary records: location

VA benefit records: location or custodian

VA pre-need burial decision: location, if obtained

Marriage / family certificates: location

Will, trust and advance directives: location

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3. My funeral and memorial wishes

Complete the items that apply; leave others blank. Review after major family or planning changes.

Funeral home preference and contact

Burial, cremation or other preference

Cemetery / plot / prearrangement location

Faith tradition / type of service desired

Visitation / viewing preferences

Casket / urn preference and budget

Military honors / branch preference

Flag recipient / keepsake preference

Flowers or memorial donation preference

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4. Service, remembrance and personal wishes

Complete the items that apply; leave others blank. Review after major family or planning changes.

Clergy / officiant preference

Readers and chosen readings / prayers

Music / hymns / songs requested

Pallbearers / honorary pallbearers

Speakers / eulogy or remembrance preferences

Obituary / biography / preferred photo location

Reception / gathering location preference

Keepsakes and personal messages: instructions location

Other wishes for family to know

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5. Financial, household and digital records

Complete the items that apply; leave others blank. Review after major family or planning changes.

Bank / investment inventory: secure location

Insurance policies / beneficiaries: location

Pension / other income records: location

Tax preparer and records location

Property / vehicle records: location

Mortgage / debts / bills inventory: location

Household / pet care instructions: location

Digital legacy / authorized access instructions: location

Other documents or professional contacts

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6. Family action checklist

Use only the actions that apply. Confirm current instructions with the responsible organization.

☐ Contact chosen funeral director; record contact / date

☐ Locate discharge papers, retirement and burial records

☐ Discuss service, cemetery and military honors with director

☐ Request certified death certificates; note arrangements

☐ Contact VA about applicable survivor / burial matters

☐ Contact retired-pay office / DFAS, if applicable

☐ Confirm Social Security reporting; ask about survivor benefits

☐ Contact attorney / representative and insurance providers

☐ Notify MOAA / chapter; request surviving spouse support

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7. Follow-up notes and review

Complete the items that apply; leave others blank. Review after major family or planning changes.

VA / benefits contact and follow-up notes

Retired-pay / DFAS contact and follow-up notes

Social Security contact and follow-up notes

Insurance / financial institution follow-up

MOAA / chapter contact and follow-up

Other family responsibilities or open questions

Next review date

Person who helped prepare this checklist

Additional instructions location

Print completed checklist

Save your completed copy first. Print all pages with completed form fields.

If this button does not work in your viewer, use File > Print (Mac: Command-P; Windows: Ctrl-P).

Personal planning worksheet; not a will, legal directive or determination of benefits.

Confirm formal arrangements with your family, advisors and relevant agencies.