COURTESY, THE SPECIAL OPERATIONS ASSOCIATION*

SURVIVOR'S/EXECUTOR'S GUIDE



"WHAT MY FAMILY SHOULD KNOW"

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APPROVED:

SOA Board of Directors, 2002

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*Used With Permission

Preface

You are about to start assembling one of the most important written plans in a long time. This is one your family will appreciate.

When I first went to work for the Veterans Administration and survivors would come in to file for benefits and while developing claims, their answer was usually: "My husband took care of those kind of things."

After the main provider has passed, there are in excess of 80 decisions that the survivor must make (Yes/No, Buy etc.) within the first 40 hours. This is an unreasonable burden that you can remove from your loved ones by completing this plan.

You have been responsible for taking care of your family for all these years and, of course, there is "one more thing."

While it looks overwhelming, remember the old adage: "How do you eat an elephant?" Of course, "one bite at a time." And so it is with this task.

Do not attempt it in one sitting. Set a time, such as Saturday morning over coffee, and do a fixed number of pages. There is a bit of research as you will see once you read through the plan.

You will need to obtain various official documents, such as:

- Birth Certificates (go online and look at the state where you were born and it will direct you to the correct office for birth certificates).
- DD 214s (all of them).
- Marriage and Divorce documents (both persons).
- Copies of bank deposits and related financial records.

None of these need to be certified.

Preface, Cont'd. You may also want to consider having the following supplemental documents on hand. (This is not all inclusive.)

1. Last Will & Testament

The fundamental purpose of a will is to outline who will receive your assets upon your death. Another important purpose of a will is to specify guardianship for your minor children. A guardian is one who takes legal responsibility for the care of your minor or incapacitated children after you are gone. It is important to understand that a will does not become effective until the date of death. So it does not provide any benefits during your lifetime. A will can be changed at any time (assuming you are not mentally incapacitated). It can be amended by using a codicil or revoked by writing a new will. A will can also create a trust upon your death (more on this below). If your estate is large enough (over $5.49 million in 2017), you may also need to incorporate federal estate tax planning into your documents.

2. Trust

A trust is a legal instrument that provides ongoing management for your assets. It can be *inter vivos* (also known as a Living Trust, which exists during your lifetime) or Testamentary (one that is created by your will upon your death). It is a good idea to leave assets in trust if the beneficiaries are minors, incapacitated, or if they are simply not fiscally responsible. The trust document names a trustee who has the responsibility of managing the assets in the trust and determines when and how much of the trust assets to distribute (subject to the terms you have written in the trust). You may want to name a trustee while your child is under a certain age, say 25 or 30. Then, once your child reaches that specific age, they can either act as their own trustee, or the trust can terminate and distribute all of the assets to your child outright.

3. Power of Attorney

A Power of Attorney allows you to empower someone else to act on your behalf for legal and financial decisions. It can be a Durable Power of Attorney, which becomes effective immediately, or a Springing Power of Attorney, which becomes effective upon a stipulated event, typically when you are disabled or mentally incompetent. It is critical that you completely trust the person to whom you provide this power, as he or she can legally act on your behalf.

4. Healthcare Power of Attorney

A Healthcare Power of Attorney (also known as a Medical Power of Attorney) gives a trusted individual the authority to make decisions about your medical treatment should you be unable to do so on your own. No financial authority is granted in this document, only medical power. So you could provide one person the Durable Power of Attorney and another person the Healthcare Power of Attorney if you desire.

5. Living Will

While the Healthcare Power of Attorney authorizes another to make medical decisions on your behalf, a Living Will (also known as a Directive to Physicians) sets out your predetermined wishes regarding end-of-life care should you become terminally ill or permanently unconscious. Essentially it takes the decision to withhold life out of the hands of your medical providers and the ones you love so that they are not burdened by it and so that you can be assured your wishes are respected.

6. HIPAA Release

One of the important provisions of the Health Insurance Portability and Accountability Act of 1996 (HIPAA) is the obligation that medical records be kept confidential. While this is definitely an important requirement, it can have severe unintended consequences. Without the legal authority to share medical records, your family may not be able to obtain important information regarding your medical condition and treatment if you were to become incapacitated. A HIPAA release allows your medical providers to share and discuss your medical situation with whomever you specify in the document.

7. Letter of Intent

A Letter of Intent is a simple, non-binding personal letter to the ones you love expressing your desires and special requests. It may include information regarding burial or cremation, or a specific bequest of collectibles or personal items. While it does not typically have legal authority, it can help to clear up confusion regarding your personal preferences.

SPECIAL OPERATIONS ASSOCIATION
Post Office Box 237961
Cocoa, Florida 32923-7961

TO: SOA Members and their families:

During the last few years, the SOA BOD has had the unpleasant task of assisting many of our member's families during the most painful times of their lives, the passing of their loved ones. The families were living across the USA and in some cases overseas and it was difficult to locate SOA members who had the knowledge and the time to assist them in their time of need. We have been fortunate to have members like Clyde Sincere (President Emeritus) who, with his institutional knowledge, has been able to work in conjunction with Jake Jacobson (Executive Director) to identify a knowledgeable SOA member living near the family and to coordinate the assistance effort.

The fact of the matter is that this type of service is part of our Constitution as an IRC 501 (c) (19) "Veterans Service" organization and one of the reasons we were formed. In the past year, the SOA Executive Director Jake Jacobson and BOD Member C. L. Berg volunteered to research and present an "Information Packet" to assist our members and their families by providing a guide to the information necessary to assist them during the time of confusion and pain immediately after the loss of their loved ones. It is the BOD belief that this guide, when completed by the member, will simplify the process of planning for the future and provides assistance and direction for the surviving spouse during this emotional and stress filled time.

In many cases, the length of illness is short and the family does not have time to adequately collect the necessary information and documentation nor do they know where to go, what support is available to them, or what time constraints apply for some benefits. In some cases, the member's wishes were not fully known. For this reason, it was decided by the SOA BOD at the 2002 Mid-Year Planning Meeting that this matter was of such importance that the packet should be sent independent of the normal publications sent during the course of the year.

This is a one-time distribution to send the Planning Guide to all our current members. Future members will receive their guide with their initial Membership packets.

The SOA BOD hopes that this will be of assistance to you the member and your family.

Sincerely:

James L. Hetrick

Jim Hetrick
President

Note from the Editor

This "Survivors Guide" in no way can answer all the questions that can arise in the event of a death of a loved one. Rather it is provided to assist you in finding the answers and where to get assistance.

The guide is basically organized in two parts. The first 14 pages are for strategic planning –Executor type planning for the future. The next 6 pages are for tactical planning –Information that may be useful in the near future or for a past death in the family.

Do these basic things right now:
Locate your DD Form 214,
Locate your nearest Casualty Assistance Office,
Locate the nearest Veterans Organization that can assist in Funerals and/or Memorial Services.
And remember, the Funeral Director can assist in the planning, and he has a hot line to the Department of Defense to get answers, and assistance for you.

Jake Jacobson

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"What My Family Should Know"

Most of us are efficient in our daily lives. We keep meticulous records in our respective businesses and professions. We are responsible and considerate of our families and friends. Yet most of us leave completely inadequate and incomplete records of our economic and personal affairs when we die.

When your estate is to be settled, there are many questions that must be answered. This guide, "What My Family Should Know," is designed to enable you to record the necessary facts for your family, your attorney, and your executor.

We suggest that you complete it and place it in a safe place so it will be there for possible revisions by you and later use by your family.

A few minutes spent in reading the next few pages will certainly be worthwhile to you and your family.

Just knowing that this information is readily available, concisely but simply written, will increase the value of your guide.

The main purpose of the following sections is to highlight certain benefits that are available as well as to the many decisions that face the survivor. We hope that in addition to guiding your own family as to your wishes you may be able to help a friend or relative who has not had the foresight to prepare.

IMPORTANT: Do not keep this Planning Guide in your safety deposit box. After a death, the safety deposit box is usually sealed and cannot be opened unless the executor or an administrator of the estate has been appointed or in the presence of an inheritance Tax Department representative.

SOCIAL SECURITY BENEFITS

Social Security is a form of insurance that plays a very important part in estate planning. Most of us are entitled to some form of these benefits. But it is important to realize that SOCIAL SECURITY BENEFITS ARE NOT PAID AUTOMATICALLY. You must apply for these benefits on special forms, and certain documents must be furnished at that time. These forms and documents, listed below, must be furnished within a specific TIME LIMIT.

How to Claim (Documents You Need)

1. Social Security Proof of Death
2. Social Security Card for Deceased
3. Copy of Marriage Certificate
4. Birth Certificate of Applicant
5. Birth Certificate of Deceased
6. Birth Certificates of minor children
7. Disability Proof for children over 18
8. Proof of support if applicant is parent or husband

Death Benefit

A lump sum will be made to the surviving spouse if he or she was living in the same household with the insured person at the time of death. If no qualified spouse survives, the payment can be made only to eligible children.

Survivor's Payments

If an insured person dies, the widow, dependent widower, children, and dependents' parents of that person may be eligible for monthly survivor's payments.

Contact the Social Security office near you for additional facts and information.

To find out the current status of your Social Security account, use the attached post cards. This information should be obtained at least once every three years. Additional cards can be obtained by calling your local Social Security Administration Office listed in your telephone book.

VETERAN'S BENEFITS

Veterans' survivors are entitled to many burial related benefits. However, these benefits *will not* be paid automatically. Claims for Veterans' benefits must usually be made within *two years* from the date of final interment.

As an honorably discharged veteran from the Air Force, Army, Navy, Marines, or Coast Guard, you are entitled to:

1. A burial allowance limited to $300 for expenses for burial and funeral of the deceased. This allowance will be paid only for veterans who were entitled to receive a Veterans Administration pension or compensation.
2. An allowance of $150 payable towards the burial plot expenses of a Veteran who is not buried in a national cemetery.
3. A burial flag that can be given to the next of kin or friend of deceased.
4. Bronze Memorial or headstone.

Veteran's benefits are frequently altered and revised. There may also be Veterans benefits from your county. To determine your eligibility or to file your claim, contact your local Veteran's Administration or write Veterans Administration, Washington, DC 20421. Toll Free Number **800/827-1000.**

How to File A Claim for Veteran's Benefits.

The following forms must be submitted.

1. Veteran's Discharge Papers/DD Form 214
2. Certified copy of Death Certificate
3. Copy of Marriage Certificate
4. Birth Certificate of minor children
5. Receipted itemized funeral bill

WILLS

Everyone needs a will! A will is one of the finest protections you can give to those special people in your live... a husband or wife, children, relatives, good friends, or a special charity.

An up-to-date will is the only way that you can control the distribution of your property at death. Otherwise, the state takes over and your property is distributed according to established laws of succession. Your lawyer will help you write your will tailored to your exact wishes. If you have not had a will drawn up, we urge you to do so as soon as possible.

INSURANCE

Each company requires a certified copy of the death certificate when application is made for life insurance benefits.

LIFE INSURANCE POLICY LIST

Company	Location	Policy No.	Amount
Agent	Phone Number	Primary Beneficiary	
Company	Location	Policy No.	Amount
Agent	Phone Number	Primary Beneficiary	
Company	Location	Policy No.	Amount
Agent	Phone Number	Primary Beneficiary	

ACCIDENT AND HEALTH INSURANCE

Company Covered	Location	Policy No.	
Agent	Phone Number	Primary Beneficiary	
Company	Location	Policy No.	Covered
Agent	Phone Number	Primary Beneficiary	
Company Covered	Location	Policy No.	
Agent	Phone Number	Primary Beneficiary	

PROPERTY INSURANCE LIST

Company	Location	Policy No.	Property Covered
Agent	Phone Number	Primary Beneficiary	
Company	Location	Policy No.	Property Covered
Agent	Phone Number	Primary Beneficiary	

VITAL INFORMATION (VETERAN)

Name_____
First Middle Initial Last

Social Security_____

Please state location of:

Birth Certificate_____ Marriage License_____

Children's Birth Certificates_____ Will_____

Military Discharge_____ Stocks and Bonds_____

Mortgage_____ Deeds or Notes_____

Automobile Title_____ Income Tax Returns_____

Valuables_____ Other_____

Safety Deposit Box: Bank_____ Number_____ Key_____

BANKING AND INVESTMENT INFORMATION

Type of Account_____ Account No._____ Bank_____

Type of Account_____ Account No._____ Bank_____

Type of Account_____ Account No._____ Bank_____

Investments_____ Certificate No._____ Location_____

Investments_____ Certificate No._____ Location_____

Investments_____ Certificate No._____ Location_____

Investments_____ Certificate No._____ Location_____

Investments_____ Certificate No._____ Location_____

CHARGE ACCOUNTS AND CREDIT CARDS (List company account number and phone number)

1._____ 5._____

2._____ 6._____

3._____ 7._____

4._____ 8._____

REAL ESTATE OWNED

Location_____ Mortgagee_____

Location_____ Mortgagee_____

Location_____ Mortgagee_____

LIST OF VALUABLE PERSONAL EFFECTS

Item_____ Location_____ Designated Person_____

Item_____ Location_____ Designated Person_____

Item_____ Location_____ Designated Person_____

VITAL INFORMATION (WIFE)

Name_____
First Middle Initial Last

Social Security_____

Please state location of:

Birth Certificate_____ Marriage License_____

Children's Birth Certificates_____ Will_____

Military Discharge_____ Stocks and Bonds_____

Mortgage_____ Deeds or Notes_____

Automobile Title_____ Income Tax Returns_____

Valuables_____ Other_____

Safety Deposit Box: Bank_____ Number_____ Key_____

BANKING AND INVESTMENT INFORMATION

Type of Account_____ Account No._____ Bank_____

Type of Account_____ Account No._____ Bank_____

Type of Account_____ Account No._____ Bank_____

Investments_____ Certificate No._____ Location_____

Investments_____ Certificate No._____ Location_____

Investments_____ Certificate No._____ Location_____

Investments_____ Certificate No._____ Location_____

Investments_____ Certificate No._____ Location_____

CHARGE ACCOUNTS AND CREDIT CARDS (List company account number and phone number)

1._____ 5._____

2._____ 6._____

3._____ 7._____

4._____ 8._____

REAL ESTATE OWNED

Location_____ Mortgagee_____

Location_____ Mortgagee_____

Location_____ Mortgagee_____

LIST OF VALUABLE PERSONAL EFFECTS

Item_____ Location_____ Designated Person_____

Item_____ Location_____ Designated Person_____

Item_____ Location_____ Designated Person_____

PERSONAL STATISTICS (VETERAN)

Name_____
First Middle Initial Last

Address_____ City_____ State____ Zip_____

Telephone_____ Years at present address_____

Prior Address_____

Date of Birth_____ Place of Birth_____

Social Security No._____ Citizen of_____

Naturalization No. (If not born in U.S.)_____

Name of Father_____ Place of Birh_____ Date of Birth_____

Name of Mother_____ Place of Birth_____ Date of Birth_____

Marital Status: ☐ Married ☐ Divorced ☐ Widower ☐ Single

Schools _____ From:_____ To:_____ Degree:_____

Attended _____ From:_____ To:_____ Degree:_____

Fraternities _____ From:_____ To:_____ Position Held:_____

or Honor _____ From:_____ To:_____ Position Held:_____

Societies _____ From:_____ To:_____ Position Held:_____

Civic or _____ From:_____ To:_____ Where_____

Public Offices _____ From:_____ To:_____ Where_____

Held _____ From:_____ To:_____ Where_____

Special _____

Achievements _____

Or Recognition _____

Organization _____ Office Held_____ Benefits Due ☐ Yes ☐ No

Affiliations _____ Office Held_____ Benefits Due ☐ Yes ☐ No

Professional Company_____ Job Title:_____ From:_____ To:_____

Statistics Company_____ Job Title:_____ From:_____ To:_____

Professional _____

Achievements _____

Military Branch_____ Serial No._____ From:_____ To:_____

Statistics Theater(s) of Service_____ Grade. Rank. Rating._____

Citations.Recognitions.Awards_____

Name of Veteran Organizations_____

PERSONAL STATISTICS (WIFE)

Name_____
First Middle Initial Last

Address_____ City_____ State____ Zip_____

Telephone_____ Years at present address_____

Prior Address_____

Date of Birth_____ Place of Birth_____

Social Security No._____ Citizen of_____

Naturalization No. (If not born in U.S.)_____

Name of Father_____ Place of Birh_____ Date of Birth_____

Name of Mother_____ Place of Birth_____ Date of Birth_____

Marital Status: ☐ Married ☐ Divorced ☐ Widower ☐ Single

Schools _____ From:_____ To:_____ Degree:_____

Attended _____ From:_____ To:_____ Degree:_____

Fraternities _____ From:_____ To:_____ Position Held:_____

or Honor _____ From:_____ To:_____ Position Held:_____

Societies _____ From:_____ To:_____ Position Held:_____

Civic or _____ From:_____ To:_____ Where_____

Public Offices _____ From:_____ To:_____ Where_____

Held _____ From:_____ To:_____ Where_____

Special _____

Achievements _____

Or Recognition _____

Organization _____ Office Held_____ Benefits Due ☐ Yes ☐ No

Affiliations _____ Office Held_____ Benefits Due ☐ Yes ☐ No

Professional Company_____ Job Title:_____ From:_____ To:_____

Statistics Company_____ Job Title:_____ From:_____ To:_____

Professional _____

Achievements _____

Military Branch_____ Serial No._____ From:_____ To:_____

Statistics Theater(s) of Service_____ Grade. Rank. Rating._____

Citations.Recognitions.Awards_____

Name of Veteran Organizations_____

FAMILY REGISTRY (VETERAN)

Registry of Children

Given Name	Address	Date of Birth	Place of Birth

Registry of Brothers and Sisters

Given Name	Address	Date of Birth	Place of Birth

Other Friends and Advisors

Given Name	Address	Date of Birth	Place of Birth

Deceased Members of the Family

Given Name	Address	Date of Birth	Place of Birth

FAMILY REGISTRY (WIFE)

Registry of Children

Given Name	Address	Date of Birth	Place of Birth

Registry of Brothers and Sisters

Given Name	Address	Date of Birth	Place of Birth

Other Friends and Advisors

Given Name	Address	Date of Birth	Place of Birth

Deceased Members of the Family

Given Name	Address	Date of Birth	Place of Birth

MEMORIAL INSTRUCTIONS (VETERAN)

AT MY REQUEST,_____has consented to carry out the following arrangements in accordance to my wishes.

MY WILL, dated_____, is deposited at_____

The Executor/Executrix I have chosen is_____

Preference in Burial Arrangements

☐ Ground Burial ☐ Mausoleum ☐ Cremation ☐ Other Vault_____Casket_____

Cemetery Section_____Lot Number_____Space Number_____

Funeral Director_____

Reserved Interment Space in my Family Burial Plot

Name Relationship Cemetery

_____

_____

_____

_____

_____

_____

Type of Service

☐ Church ☐ Funeral Chapel ☐ Gravesite ☐ Temple ☐ Cemetery Chapel ☐ Home ☐ Military

Clergy_____Denomination_____Fraternal Organizations_____

Military Organizations_____

Special Arrangements (i.e. Scripture, Hymns, flowers, music)_____

_____

Palberrers_____

_____

_____

Preference in Memorialization

☐ Bronze Memorial_____Design_____Border_____

Lettering_____Emblems_____Inscription_____

☐ Bronze Urn Design_____Emblem_____

☐ Crypt Letters Design_____Emblem_____

☐ Crypt Plate Design_____Emblem_____

☐ Other_____

MEMORIAL INSTRUCTIONS (WIFE)

AT MY REQUEST,_____has consented to carry out the following arrangements in accordance to my wishes.

MY WILL, dated_____, is deposited at_____

The Executor/Executrix I have chosen is_____

Preference in Burial Arrangements

☐ Ground Burial ☐ Mausoleum ☐ Cremation ☐ Other Vault_____ Casket_____

Cemetery Section_____Lot Number_____Space Number_____

Funeral Director_____

Reserved Interment Space in my Family Burial Plot

Name Relationship Cemetery

_____

_____

_____

_____

_____

_____

Type of Service

☐ Church ☐ Funeral Chapel ☐ Gravesite ☐ Temple ☐ Cemetery Chapel ☐ Home ☐ Military

Clergy_____Denomination_____Fraternal Organizations_____

Military Organizations_____

Special Arrangements (i.e. Scripture, Hymns, flowers, music)_____

_____

Palberrers_____

_____

_____

Preference in Memorialization

☐ Bronze Memorial_____Design_____Border_____

Lettering_____Emblems_____Inscription_____

☐ Bronze Urn Design_____Emblem_____

☐ Crypt Letters Design_____Emblem_____

☐ Crypt Plate Design_____Emblem_____

☐ Other_____

The main purpose of this section is to call attention to the 87 decisions* that must be made by a survivor after a death. By making these important decisions now, you can minimize the emotional strain that will be placed on your survivors.

87 THINGS THAT MUST BE DONE BY THE SURVIVOR

Indicates details that can be planned or prepaid *ahead of time

A) Secure Vital Statistics (Required for burial permit)
- * 1. Name, home address and telephone no.
- * 2. How long in state
- * 3. Name of business, address and telephone no.
- * 4. Occupation and title.
- * 5. Social Security No.
- * 6. War Veterans Serial no.
- * 7. Date of Birth
- * 8. Place of Birth
- * 9. U.S. Citizen
- * 10. Father's name
- * 11. Father's birthplace
- * 12. Mother's maiden name
- * 13. Mother's birthplace
- * 14. Religious name (if any)

B) Pay some or all of the following
- *15. Family burial estate
- *16. Memorials
- *17. Funeral director
- *18. Interment Service
- 19. Clergy
- 20. Florist
- 21. Clothing
- 22. Transportation
- 23. Telephone and telegraph
- 24. Food
- 25. Doctors
- 26. Nurses
- 27. Hospitals and ambulance
- 28. Medicine and drugs
- 29. Other current and urgent bills (mortgage or rent, taxes, installment payments)

C) Collect documents (required to establish rights for insurance, pensions, social security, ownership, relationship, etc.
- *30. Will
- *31. Legal proof of age or birth certificate
- *32. Social Security card or number
- *33. Marriage license
- *34. Citizenship papers
- *35.Insurance policies (life, health and accident, property)
- *36. Bank books
- *37. Deeds to property
- *38. Bill of sale of car
- *39. Income tax returns, receipts or canceled checks
- *40. Veterans discharge certificate/DD Form 214
- *41. Disability claims
- *42. Memorial Park Certificate of Ownership

D) Decide and Arrange Within a Few Hours
- *43 Burial estate location and which space to open
- *44 Memorial type and inscription
- *45 Casket type
- * 46. Clothing for deceased
- * 47. Vault or sectional crypt
- * 48. Type of service (religious, military, fraternal)
- * 49. Special selection from scriptures.
- 50. Clergy to officiate
- 51. Which funeral director
- * 52. Place where service is to be held
- 53. Time for funeral service
- * 54. Decide name of charitable organization to which donations are suggested in memory of deceased.
- 55. Providing information for eulogy
- 56. Select names for pallbearers
- 57. Flowers
- * 58. Music
- 59. Clothing for you and children
- 60. Preparation at home, including food for family and guests.
- 61. Extra chairs
- 62. Transportation for family and guests, including planning funeral car list
- 63. Checking and signing necessary papers for burial permit
- * 64. Providing vital statistics about deceased to newspapers
- * 65. Providing addresses and telephone numbers for all interested people.
- 66. Answering innumerable sympathetic phone calls, messages, wires, and letters
- 67. Meeting and talking with funeral director, cemetery representative, clergy, about all details
- 68. Greeting all friends and relatives who call
- 69. Arranging for meeting relatives who arrive from out of state at airport or railroad station
- 70. Providing lodging for out-of-town relatives
- 71. Make list of callers and floral tributes sent for mailing cards of thanks
- * 72. Arranging for special religious services
- * 73. Check Will regarding special wishes
- 74. Order death certificate
- 75. Look after minor children

E) Notify as soon as possible
- 76. The doctor or doctors
- 77. The funeral director
- 78. The memorial park
- 79. All relatives
- 80. All friends
- 81. Employer of deceased
- 82. Employers of relatives not going to work
- 83. Casket-bearers
- 84. Insurance agents (life, health, and accident)
- 85. Religious, fraternal, civic, veterans organizations, unions
- 86. Newspapers regarding notices
- 87. Attorney, accountant, or executor of estate

BURIAL & MEMORIAL BENEFITS

Military Funeral Honors

Military Funeral Honors
"Honoring Those Who Served"

The Department of Defense (DOD) is responsible for providing military funeral honors. The Department of Veterans Affairs (VA) National Cemetery Administration cemetery staff assists with military funeral honors at VA national cemeteries.

On January 1, 2000, the Department of Defense began the implementation plan for providing military funeral honors for eligible veterans as enacted in Section 578 of Public Law 106-65 of the National Defense Authorization Act for FY 2000.

"Honoring Those Who Served" is the title of the DOD program for providing dignified military funeral honors to veterans who have defended our Nation. While military funeral honors are a long-standing tradition within the Armed Forces, this DOD program is in response to the new law governing funeral honors for eligible veterans.

Upon the family's request, the law requires that every eligible veteran receive a military funeral honors ceremony to include folding and presenting the United States burial flag and the playing of Taps. The law defines a military funeral honors detail as consisting of two or more uniformed military persons with at least one a member of the veteran's parent service of the Armed Forces. The DOD program calls for funeral home directors to request military funeral honors on behalf of the veterans' family. Veterans' organizations may assist in the provision of military funeral honors. When military funeral honors at a national cemetery are desired, they are arranged prior to the committal service by the funeral home.

Questions or comments concerning the DOD military funeral honors program may be sent to the address listed below. A military funeral honors web site is located at: www.militaryfuneralhonors.osd.mil.

TO ARRANGE MILITARY FUNERAL HONORS, CONTACT YOUR LOCAL FUNERAL DIRECTOR

BURIAL & MEMORIAL PROCEDURES

As outlined in the preceding page, certain honors will be provided by Public Law as enacted by National Defense Authorization Act for FY 2000. This honor starts with the participation of two or more uniformed military personnel, and can be expanded according to location of the burial, and memorial service, and the status of the deceased veteran: retiree or non-retiree.

Prior planning will certainly enhance the ceremony, and provide the Funeral Director with the necessary information to conduct the proper burial, and memorial. Things to consider by the next of kin or spouse:

Cremation or internment.
Location of internment and ceremony.
Honors requested by the deceased or family.

Once these desires are made known to the Funeral Director, he can start to coordinate the support needed. This support will be dictated by the location of the burial and/or ceremony. If the location is in a remote area, the support will be at a minimum the mandatory two uniformed military personnel who will fold, and present the flag, and the playing of taps on a portable cassette player.

This support can be expanded if the deceased is a Retiree and/or the following organizations are in the proximity of the burial and/or ceremony:

Veteran Organizations such as the VFW or American Legion. They may be able to furnish full honors with a firing squad, pallbearers, flag folder/presenter, and possibly a live bugler. Any expense incurred by these organizations is reimbursable by DOD. The Funeral Director will know what's available.

Local National Guard or Reserve Units in the area to include National Guard Special Forces. Again the Funeral Director should know what's available.

Special Forces Association Chapters in the area will assist with whatever assets they have, normally pallbearers.

Military Installations may provide firing squads, pall bearers, Chaplain, and maybe a bugler. They are limited in some cases the distance they can travel. Each Installation has their own SOP but in most cases will bend the rules in distance.

TO ARRANGE MILITARY FUNERAL HONORS, CONTACT YOUR LOCAL FUNERAL DIRECTOR

THE FUNERAL DIRECTOR

As distasteful as this subject is, the importance can not be overlooked. Read and heed. What do you do when a veteran dies? One of the first things is to determine which funeral home to use. It pays to be selective and know ahead of time that the selected home has personnel that know how to handle a deceased service member. Service members may be (and retirees usually are) eligible for a death benefit's.

Therefore one of the most important documents a survivor needs is the service member's DD Form 214 (record of service).

Death of a service member is certainly not easy for the survivors. But there are people to help the survivors in this time of sorry. The funeral director has a key role. Aside from the usual functions with the deceased, the funeral director should contact the Service Casualty Assistance Officer. The Casualty Assistance Office will get the ball rolling with survivor benefits and service connected benefits due the deceased. Also he will file a statement of death with Social Security and order the number of Death Certificates that are requested by the survivor.

PRESIDENTIAL MEMORIAL CERTIFICATE

A Presidential Memorial Certificate (PMC) is an engraved paper certificate, signed by the current President, to honor the memory of honorably discharged deceased veterans.

History

This program was initiated in March 1962 by President John F. Kennedy and has been continued by all subsequent Presidents. Statutory authority for the program is Section 112, Title 38, of the United States Code.

Administration

The Department of Veterans Affairs (VA) administers the PMC program by preparing the certificates which bear the President's signature expressing the country's grateful recognition of the veteran's service in the United States Armed Forces.

Eligibility

Eligible recipients include the deceased veteran's next of kin and loved ones. More than one certificate may be provided.

Application

Eligible recipients, or someone acting on their behalf, may apply for a PMC in person at any VA regional office or by U.S. mail only. Requests cannot be sent via email. There is no form to use when requesting a PMC. Please be sure to include a return mailing address with your request and a copy of the veteran's discharge documents.

BURIAL ALLOWANCE

What is a VA Burial Allowance?

A VA burial allowance is a partial reimbursement of an eligible veteran's burial and funeral costs. When the cause of death is not service-related, the reimbursement is generally described as two payments: (1) a burial and funeral expense allowance, and (2) a plot interment allowance.

Who Is Eligible?

You may be eligible for a VA burial allowance if:

you paid for a veteran's burial or funeral ***AND***
you have not been reimbursed by another government agency or some other source, such as the deceased veteran's employer ***AND***
the veteran was discharged under conditions other than dishonorable.

In addition, at least one of the following conditions must be met:

the veteran died because of a service-related disability ***OR***
the veteran was receiving VA pension or compensation at the time of death ***OR***
the veteran was entitled to receive VA pension or compensation but decided not to reduce his/her military retirement or disability pay ***OR***
the veteran died in a VA hospital or while in a nursing home under VA contract

How Much Does VA Pay?

Service-related death -- VA will pay up to $1,500 toward burial expenses prior to September 1, 2001. For deaths on or after September 1, 2001, VA will pay $2,000. If the veteran is buried in a VA national cemetery, some or all of the cost of moving the deceased may be reimbursed.

Nonservice-related death -- VA will pay up to $300 toward burial and funeral expenses, and a $150 plot interment allowance for deaths prior to December 1, 2001. For deaths on or after December 1, 2001, VA will pay $300. If the death happened while the veteran was in a VA hospital or under contracted nursing home care, some of all of the costs for transporting the deceased's remains may be reimbursed.

How Can I Apply?

You can apply by filling out: "http://www.vba.va.gov/pubs/candpforms.htm">VA Form 21-530, Application for Burial Allowance. You should attach proof of the veteran's military service (DD 214), a death certificate, and copies of funeral and burial bills you have paid. Mail the completed form and documents to the nearest VA Regional office .

For More Information Call Toll-Free at 1-800-827-1000

HEADSTONES AND MARKERS

On December 27, 2001, President Bush signed Public Law 107-103, the Veterans Education and Benefits Expansion Act of 2001.

This law includes a provision that allows the Department of Veterans Affairs (VA) to furnish an appropriate headstone or marker for the graves of eligible veterans buried in private cemeteries, whose deaths occur on or after December 27, 2001, regardless of whether the grave is already marked with a non-government marker.

This new provision will be codified at 38 U.S.C. § 2306(d). :

The National Cemetery Administration (NCA) is preparing a regulation to describe how we will implement the new law. Until the regulation is published, the following instructions are in effect.

- VA will furnish, when requested, an appropriate Government headstone or marker at the expense of the United States for the grave of an eligible veteran or eligible reservist who is buried in a private cemetery regardless of whether the grave is already marked by a headstone or marker purchased at private expense.
- The veteran's death must have occurred on or after December 27, 2001, which is the law's enactment date. For those veterans who died before this date, VA is unable to provide a Government headstone or marker for already marked veteran gravesites.
- VA may provide any headstone or marker available, as listed on the application form
- A Government headstone or marker may be furnished only if the individual making the request certifies that the marker will be placed on the grave, if feasible, otherwise, as close to the grave as possible within the grounds of a private cemetery.
- VA shall deliver any headstone or marker furnished under this law directly to the cemetery where the grave is located or to a receiving agent for delivery to the cemetery, i.e. funeral home, Veterans' Service Officer, etc.
- NCA will revise its headstone and marker application (VA Form 40-1330) to remove language-indicating markers will only be provided for unmarked graves. Until this form is revised, applicants should ignore references to "unmarked graves, footstones, and supplement" and should note in Box 27, "Remarks" that this will be a second marker to mark a veteran's gravesite.

VETERAN'S ADMINISTRATION FORMS

ALL VETERANS SHOULD PROCURE THE FOLLOWING VA FORMS:

VA Form 21-534 for your spouse or the custodian of your children (or both if such is the case). Put your name, VA file number, social security number, and your service information in the appropriate places at the top of the form. Check the appropriate block to indicate a claim for service-connection for cause of death. If you're a wartime veteran, go over the instructions and details regarding pension with your spouse.

VA Form 21-4138 (Statement in Support of Claim). At least five copies. Supply any potential claimant with this form.

VA Form 21-8416 (reports expenses to reduce income for VA purposes). If you're a wartime veteran at least three copies. You parents will need this too.

VA Form 21-530 (Application for Burial Expense Reimbursement) and as with VA Form 21-534, check the block to indicate service connection for cause of death.

VA Form 40-1330 Read over the instructions carefully and, as with the above forms, "head up" this form with all your data.

VA Form 28-5490 (Claim for Dependents Educational Assistance) One copy for your spouse, and one for each of your children.

VA Form 21-535 (does for your parents what VA Form 21-534 does for your spouse and children). One copy for each of your parents. Don't forget VA Forms 21-4138 and 21-8416

The flag application can be supplied by the funeral director as well as VA Form 21-530. Be sure the funeral director has your VA file number. Remember that nothing can be laid on top of the flag. No floral casket sprays or blankets.

FINALLY GET A COPY OF VA PAMPHLET 80-(CURRENT YEAR)-1, "FEDERAL BENEFITS FOR VETERANS AND DEPENDENTS". AND IN FILLING OUT THE FORMS, LEAVE NO BLANKS. COMPLETE ALL BLOCKS. IF IT IS NOT APPLICABLE, INDICATE SO WITH A *N/A.*

LAWS RELATING TO FUNERAL HONORS FUNCTIONS AT FUNERALS OF VETERANS, AS AMENDED OR ENACTED BY SECTION 578 OF PUBLIC LAW 106–65I. AUTHORITY AND ADMINISTRATION TITLE 10, UNITED STATES CODE

Subtitle A—General Military Law

PART II—PERSONNEL
CHAPTER 75—DEATH BENEFITS
Sec. 1491. Funeral honors functions at funerals for veterans.

§ 1491. Funeral honors functions at funerals for veterans

(a) AVAILABILITY OF FUNERAL HONORS DETAIL ENSURED. —The Secretary of Defense shall ensure that, upon request, a funeral honors detail is provided for the funeral of any veteran.

(b) COMPOSITION OF FUNERAL HONORS DETAILS. —

(1) The Secretary of each military department shall ensure that a funeral honors detail for the funeral of a veteran consists of two or more persons.

(2) At least two members of the funeral honors detail for a veteran's funeral shall be members of the armed forces; at least one of whom shall be a member of the armed force of which the veteran was a member. The remainder of the detail may consist of members of the armed forces or members of veterans organizations or other organizations approved for purposes of this section under regulations prescribed by the Secretary of Defense. Each member of the armed forces in the detail shall wear the uniform of the member's armed force while serving in the detail.

(c) CEREMONY. —A funeral honors detail shall, at a minimum, perform at the funeral a ceremony that includes the folding of a United States flag and presentation of the flag to the veteran's family and the playing of Taps. Unless a bugler is a member of the detail, the funeral honors detail shall play a recorded version of Taps using audio equipment, which the detail shall provide if adequate audio equipment is not otherwise available for use at the funeral.

(d) SUPPORT. —To provide a funeral honors detail under this section, the Secretary of a military department may provide the following:

(1) Transportation, or reimbursement for transportation, and expenses for a person who participates in the funeral honors detail and is not a member of the armed forces or an employee of the United States.

(2) Materiel, equipment, and training for members of a veterans organization or other organization referred to in subsection (b)(2).

(e) WAIVER AUTHORITY. —

(1) The Secretary of Defense may waive any requirement provided in or pursuant to this section when the Secretary considers it necessary to do so to meet the requirements of war, national emergency, or a contingency operation or other military requirements. The authority to make such a waiver may not be delegated to an official of a military department other than the Secretary of the military department and may not be delegated within the Office of the Secretary of Defense to an official at a level below Under Secretary of Defense.

(2) Before or promptly after granting a waiver under paragraph (1), the Secretary shall transmit a notification of the waiver to the Committees on Armed Services of the Senate and House of Representatives.

(f) REGULATIONS. —The Secretary of Defense shall prescribe regulations to carry out this section. Those regulations shall include the following:

1. A system for selection of units of the armed forces and other organizations to provide funeral honors details.
2. Procedures for responding and coordinating responses to requests for funeral honors details.
3. Procedures for establishing standards and protocol.
4. Procedures for providing training and ensuring quality of performance.

(g) ANNUAL REPORT. —The Secretary of Defense shall submit to the Committee on Armed Services of the Senate and the Committee on National Security of the House of Representatives a report not later than January 31 of each year beginning with 2001 and ending with 2005 on the experience of the Department of Defense under this section. Each such report shall provide data on the number of funerals supported under this section, the cost for that support, shown by manpower and other cost factors, and the number and costs of funerals supported by each participating organization. The data in the report shall be presented in a standard format, regardless of military department or other organization.

(h) VETERAN DEFINED. —In this section, the term 'veteran' means a decedent whom—

1. served in the active military, naval, or air service (as defined in section 101(24) of title 38) and who was discharged or released therefrom under conditions other than dishonorable; or
2. was a member or former member of the Selected Reserve described in section 2301(f) of title 38.

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Subtitle E—Reserve Components

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PART II—PERSONNEL GENERALLY

CHAPTER 1213—SPECIAL APPOINTMENTS, ASSIGNMENTS, DETAILS, AND DUTIES

Sec.

12503. Ready Reserve: funeral honors duty.

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§ 12503. Ready Reserve: funeral honors duty (a) ORDER TO DUTY. —A member of the Ready Reserve may be ordered to funeral honors duty, with the consent of the member, in preparation for or to perform funeral honors functions at the funeral of a veteran as defined in section 1491 of this title.

(b) SERVICE CREDIT. —A member ordered to funeral honors duty under this section shall be required to perform a minimum of two hours of such duty in order to receive—

1. service credit under section 12732(a)(2)(E) of this title; and
2. (2) if authorized by the Secretary concerned, the allowance under section 435 of title 37.

(c) REIMBURSABLE EXPENSES. —A member who performs funeral honors duty under this section may be reimbursed for travel and transportation expenses incurred in conjunction with such duty as authorized under chapter 7 of title 37 if such duty is performed at a location 50 miles or more from the member's residence.

(d) REGULATIONS. —The exercise of authority under subsection

(a) is subject to regulations prescribed by the Secretary of Defense.

(e) MEMBERS OF THE NATIONAL GUARD. —This section does not apply to members of the Army National Guard of the United States or the Air National Guard of the United States. The performance of funeral honors duty by those members is provided for in section 115 of title 32.

CHAPTER 1215—MISCELLANEOUS PROHIBITIONS AND PENALTIES

Sec. 12552. Funeral honors functions at funerals for veterans.

§ 12552. Funeral honors functions at funerals for veterans Performance by a Reserve of funeral honors functions at the funeral of a veteran (as defined in section 1491(h) of this title) may not be considered to be a period of drill or training, but may be performed as funeral honors duty under section 12503 of this title

TITLE 32, UNITED STATES CODE

CHAPTER 1—ORGANIZATION

Sec.

114. Funeral honors functions at funerals for veterans.

115. Funeral honors duty performed as a Federal function.

§ 114. Funeral honors functions at funerals for veterans Subject to such regulations and restrictions as may be prescribed by the Secretary concerned, the performance of funeral honors functions by members of the National Guard at funerals for veterans of the armed forces may be treated by the Secretary concerned as a Federal function for which appropriated funds may be used. Any such performance of funeral honors functions at such a funeral may not be considered to be a period of drill or training, but may be performed as funeral honors duty under section 115 of this title.

§ 115. Funeral honors duty performed as a Federal function (a) ORDER TO DUTY. —A member of the Army National Guard of the United States or the Air National Guard of the United States may be ordered to funeral honors duty, with the consent of the member, to prepare for or perform funeral honors functions at the funeral of a veteran under section 1491 of title 10. However, a member of the Army National Guard of the United States or the Air National Guard of the United States may not be ordered to perform funeral honors functions under this section without the consent of the Governor or other appropriate authority of the State concerned.

(b) SERVICE CREDIT. —A member ordered to funeral honors duty under this section shall be required to perform a minimum of two hours of such duty in order to receive—

1. service credit under section 12732(a)(2)(E) of title 10; and
2. (2) if authorized by the Secretary concerned, the allowance under section 435 of title 37.

(c) REIMBURSABLE EXPENSES. —A member who performs funeral honors duty under this section may be reimbursed for travel and transportation expenses incurred in conjunction with such duty as authorized under chapter 7 of title 37 if such duty is performed at a location 50 miles or more from the member's residence.

(d) REGULATIONS. —The exercise of authority under subsection (a) is subject to regulations prescribed by the Secretary of Defense.

CHAPTER 81—CIVILIAN EMPLOYEES

§ 1588. Authority to accept certain voluntary services (a) AUTHORITY TO ACCEPT SERVICES. —Subject to subsection (b) and notwithstanding section 1342 of title 31, the Secretary concerned may accept from any person the following services:

(1)***

(4) Voluntary services as a member of a funeral honors detail under section 1491 of this title.