

## Personal Information

<u>NAME</u>	<u>BIRTH DATE</u>	<u>SSN</u>	<u>USAA #</u>	<u>DRIVER'S LIC</u>
Your Name				
Spouse's Name (Maiden Name also)				
Children				
Grandchildren				

## Military Information

Your Name				
Entered	USMA, Cadet	July 1, 1957		
Discharged	USMA	June 6, 1961		
Commissioned	Regular Army	June 7, 1961	Service number	
Retired	Regular Army	date	rank	
VA Claim #	GI Bill, Home loan		VA claim number	
Enrolled/Not enrolled in	RSFPP, SBP, SSBP			

## Documents

<u>DOCUMENT</u>	<u>TYPE</u>	<u>LOCATION</u>
Birth Certificates		
Self	Certified Copy	AAFMAA
Spouse	Certified Copy	AAFMAA
Parent(s)	Certified Copy	AAFMAA
Children	Consular Report	AAFMAA
	German	AAFMAA
Citizenship Papers for children born aboard		AAFMAA
Marriage License		
First Marriage	date	AAFMAA
Second Marriage	date	AAFMAA
Etc.		
Divorce Decree		
First Marriage	date	AAFMAA
Etc.		
Army Discharge		
Name	DD 214 (Enlisted)	AAFMAA
Name	DD 214 (Officer)	AAFMAA
Name	Discharge Orders	AAFMAA
Army Pay records		
Name	DFAS-CL 7220	location
Passport		
self	number, expiration date	location
spouse	number, expiration date	location
Immunization Records		
self		Location
spouse		Location
Other		
Legal Name Change	from/to	AAFMAA

## Bank Accounts/Credit Cards

<u>NAME</u>	<u>TYPE</u>	<u>ACCOUNT</u>	<u>ACCOUNT #</u>	<u>LOCATION OF RECORDS</u>
Bank One	Checking, self		Account #	Location
	Address			Location of cancelled checks
	Point of Contact (POC)			
	Telephone #			
Bank Two	Checking, Joint		Account #	Location
	Address			Location of cancelled checks
	Point of Contact (POC)			
	Telephone #			

MasterCard	Credit	Account #	Expiration Date	Location
		Address		
		Point of Contact (POC)		
		Telephone #		
VISA	Credit	Account #	Expiration Date	Location
		Address		Location of cancelled checks
		Point of Contact (POC)		
		Telephone #		
ETC.				

## Vehicles

<u>MAKE/YEAR</u>	<u>VIN</u>	<u>TITLE</u>	<u>LOCATION</u>
Nissan, Maxima, 1989	#		Location
Lincoln, Town Car, 1995	#		Location

## Investment

<u>BROKER</u>	<u>ACCOUNT #</u>	<u>NAME</u>	<u>TYPE</u>	<u>LOCATION OF RECORDS</u>
Vanguard	#	Index 500	Mutual Fund	Location
		Address		
		Point of Contact (POC)		
		Telephone #		
Vanguard	#	MMR-federal	Money Market	Location
		Address		
		Point of Contact (POC)		
		Telephone #		
U. S. Treasury	#	Treasuries	Bonds	Location
		Address		
		Point of Contact (POC)		
		Telephone #		
ETC.				

## Trusts

Trust #1 1996	Insurance Trust	
Trustee:	Name	Location
	Address	
	Phone	
Trust #2 1997	Gift Trust	
Trustee:	Name	Location
	Address	
	Phone	
and		
Trustee:	Name	Location
	Address	
	Phone	

## Real Estate

<u>DESCRIPTION</u>	<u>DEED</u>	<u>LOCATION</u>	<u>TAX RECORDS</u>
House		Location	With Tax Records
		Address	
		Point of Contact (POC)	
		Telephone #	
Time Share		Location	With Tax Records
		Address	
		Point of Contact (POC)	
		Telephone #	

# Insurance

## Life Insurance

<u>COMPANY</u>	<u>POLICY #</u>	<u>INSURED</u>	<u>FACE AMOUNT</u>	<u>BENEFICIARY</u>	<u>LOCATION</u>
Company Address Point of Contact (POC) Telephone #	#	self	XXXX	Spouse's Estate	AAFMAA
Company Address Point of Contact (POC) Telephone #	#	spouse	XXXX	My Estate	AAFMAA

There may be other policies that are provided at no cost or as a cost of membership in organizations. If death is accidental, there may be travel policies provided by credit card companies, banks or automobile clubs. Check with each financial institution and travel related organization, including travel agent.

Any other life insurance policies on our lives are in a trust or have already been transferred to our children. The children are the owners. Either way, the policies are located at AAFMAA.

## Health Insurance

	<u>COMPANY</u>	<u>POLICY #</u>	<u>LOCATED</u>
Primary:	Medicare Address Point of Contact (POC) Telephone #		
Secondary:	TriCare for Life Address Point of Contact (POC) Telephone #		
Long Term Care:	Company Address Point of Contact (POC) Telephone #	#	AAFMAA

## Auto Insurance

<u>COMPANY</u>	<u>POLICY #</u>	<u>LOCATED</u>
USAA 9800 Fredericksburg Road San Antonio, TX 78288 800-531-8111	#	Location

## Household Insurance

<u>COMPANY</u>	<u>POLICY #</u>	<u>LOCATED</u>
USAA 9800 Fredericksburg Road San Antonio, TX 78288 800-531-8111	#	Location

## Umbrella Policy

<u>COMPANY</u>	<u>POLICY #</u>	<u>LOCATED</u>
USAA 9800 Fredericksburg Road San Antonio, TX 78288 800-531-8111	#	Location



## Burial Plans

### Self

Cremation

Cremated Remains to be inurned, Arlington National Cemetery, Arlington, VA

XXX Funeral Home, Dallas, TX

Younger son, xxxxx, to make final arrangements

If a visitation, uniform is in cedar closet, attic

Obituary to Dallas, TX and Richmond, VA newspapers

Notify Association of Graduates, USMA, 845-446-1617, phone; [yj7518@usma.edu](mailto:yj7518@usma.edu), email

Donations to: **West Point Fund (Cadet Parachute Club)**

**Association of Graduates**

**698 Mills Road**

**West Point, New York 10996**

Contacts:

AAFMAA	1-800-336-4538
Class Memorial Officer	1-214-361-2472 (Gabe Gabriel)
Casualty Assistance Office	1-800-626-3317 or call collect 0-703-325-7990
Retirement Services Office	Fort Hood, 1-800-403-6640
VA	1-800-827-1000
Social Security	1-800-772-1213
Army Retired Pay	1-800-321-1080
Arlington National Cemetery	1-703-695-3250 / 3255
ID Card Update at death (DEERS)	1-408-646-1010
Death Certificates Required:	Veteran's Affairs
	Social Security
	Life Insurance Companies
	AAFMAA (Children's policies)
	Vanguard Group ( mutual funds, Gift Trust)
	Connecticut Mutual Life Insurance (Children's Trust)
	Other insurance policies (travel, accident, etc.)

### Spouse

Cremation

Cremated Remains to inurned, Arlington National Cemetery, Arlington, VA

xxxxx Funeral Home, Dallas, TX

Children to make final arrangements

Obituary to Dallas and Houston newspapers

Donations to: **Alumni Fund,**

**College of William & Mary**

**Williamsburg, VA**

Contacts:

Social Security	1-800-772-1213
AAFMAA	1-800-336-4538
Annuitant Pay	1-800-321-1080
Arlington National Cemetery	1-703-695-3250 / 3255
ID Card Update at death (DEERS)	1-408-646-1010
Death Certificates Required:	Social Security
	Mutual of New York (Children's policy)
	Vanguard Group ( IRA, mutual funds, Gift Trust, brokerage account)
	Connecticut Mutual Life Insurance (Children's Trust)
	Other insurance policies (travel, accident, etc.)

## Special Instructions

In the event of the death of either or both of us, immediately notify Army and Air Force Mutual Aid Association. They will be of great help in furnishing information needed, seeing that life insurance is paid, Social Security is notified, Department of Army is notified, etc.