

Military OneSource Podcast — Estate Information Packet Checklist

Program title: Casualty, Mortuary Affairs and Military Funeral Honors

Episode transcript

Intro voiceover:

Welcome to the Military OneSource podcast. Military OneSource is an official program of the Defense Department with tools, information and resources, to help families navigate all aspects of military life. For more information, visit MilitaryOneSource.mil.

Bruce Moody:

Today, we're going to talk about the Estate Information Packet Checklist. This is a document which is on Military OneSource, and we'll provide a link in the program notes. This is a really meaningful and an important document, and we're going to talk about it in some detail. But this is a document that can bring you peace of mind and eliminate stress for your loved ones. Whether you're a service member, a military spouse, veteran, retiree; this checklist can be a guide for you. So, let's have that conversation.

I'm Bruce Moody, and I'm joined today by my colleague, Lisa Valentine. Lisa is program manager for the Casualty, Mortuary Affairs, and Military Funeral Honors Program. Lisa, thank you so much for joining us today.

Lisa Valentine:

And thank you, Bruce, for having me, especially to talk about this very important topic, which is making sure that your affairs are in order, because we, unfortunately, know that part of life is death. And it's not something that we want to talk about or think about, but it is important to make it, I think, easier for our family members to know, what are our wishes? Because if we keep them to ourselves, they don't know, and they can't be carried out. But also, too, what are the assets that you have? Where do you want them to go? What kind of actions does your family members need to take? And so, if you use our checklist, you can make it and tailor it to your own. It's a very wonderful product that we have at Military OneSource. It doesn't cost anything, but it can really make a difference and provide that roadmap for your surviving family members to take care of things, take the stress away, and just go step-by-step.

Bruce Moody:

Right, and we're going to talk to that. When a person passes away, there's really two things that are happening. There's the grief, and then there's also, unfortunately, the mad scramble to account for all of the accounts and the documents. This document really helps people to make sense of all of that. It eliminates the stress. It's almost a full accounting of a person's documentary life, so that the family can really focus on the grieving, and not looking for, say, the password to an email account or something like that.

And so, let's talk through this document. So, Lisa and I are sitting at a desk and we're looking at my laptop. We've got MilitaryOneSource.mil open, and we're at this checklist. And so, this is a 13-page checklist, and it just goes through everything. And Lisa, maybe you can help us. It begins with a section that reads "Notify immediately upon death."

Lisa Valentine:

And this is important. What we did is we tailored this checklist where if you're a military retiree, or if you're a service member, or if maybe you're a military retiree like myself. I served in the army for 23 years, but I'm also a civilian employee. God forbid that I should die while I'm serving as a civilian employee, who all does my husband, who's my primary next of kin, who would he have to notify?

So, it talks for example that he would need to notify the Defense Casualty Accounting Office, and that's important so that my retirement check stops so that he won't have to pay money back. As a civilian employee, of course, he would have to notify my boss, and that kind of thing. But also, too, the social security administration needs to be notified, and that's for all deaths. And being that I'm a veteran, of course, The Veteran's Administration. And by making these notifications to the appropriate offices, then it can help your survivors to be able to get those benefits that they're so entitled, and also to ensure that you get those burial benefits so that it doesn't put a burden on your estate and also to the family members.

Bruce Moody:

Yeah. I really can't overstate this; the amount of information that you can put into this document, and it's not an all or nothing thing, but it is amazingly comprehensive. And, as an individual who takes the effort to go through this document and amass the information, it just removes a huge, huge burden. We've got a section here called personal and family information. This is really important stuff. We have a section here

that says, OK, well, here is the location of naturalization records, citizenship records, adoption records. It's all here in these sections.

Lisa Valentine:

Absolutely. And this includes basic information because when you're applying for stuff, you got to fill out numerous forms, and those forms ask for a lot of information. Well, if you have this document where your family members know where it's located, they can easily pull it up and they've got the information right there and they don't have to think about it. Because when you're grieving, one of the hardest things to do is to focus. But if you have the information handy-dandy, it really makes a tremendous amount of difference.

Bruce Moody:

All right, well, we're going to keep scrolling through this document. We've got a section here on key contacts, and this is important because it addresses legal issues, money issues, executor issues.

Lisa Valentine:

Absolutely, and even if you have an accountant; just various things and documents that your loved ones may need to have on the ready.

Bruce Moody:

And we're not going to list off every single thing here, but there are a number of things here that maybe people are not expecting. For example, there's a section here where you can account for personal art or collections. These could be things that you own. They could be very valuable, or they could have simply sentiment value. You can account for them, and you can explain to people what they mean to you and what you want done with them.

Lisa Valentine:

Absolutely. And we also go into detail about legal documents. Where do you have them at? Do you have them all in one area? Maybe it's too big to keep them all in one area, but do you have a living will, and do you have a will when do die? We cannot predict what the future is. And we want to think that we're not going to die right away, but these are just important things to think about.

Bruce Moody:

So, Lisa, how did this document come around? You mentioned before we started this conversation that you keep this document current, you're always updating it. So, what informs what goes into this document?

Lisa Valentine:

So, it's a myriad of things. So, this document was created because, as a veteran, I belong to a veteran service organization, and my fellow veteran ... it's a women's group, a WAC group. They came to me and said, "Lisa you're in the business of casualty and mortuary affairs, and it'd be very helpful there's a checklist so we would know what to do, because we don't necessarily have family that's still living. We might be single, but we really need a one stop shop."

It was a recommendation. We listened to what feedback that we get from our military family. And even if you're a veteran, a retiree, it doesn't mean that you're not part of the family anymore. Even for surviving family members, we embrace them and say, "You're part of our family forever." And so, that's how it came about.

But then to keep it up to date, we go to places like the National Funeral Directors Association. And today, we're at the National Cemetery, Cremation, and Funeral Association annuals conference. We come to these events so that we can learn what's new in the business. And we also know that it's very important to understand the different generations. Things are evolving within the funeral, cemetery, cremation, and I would say burial cemeteries industry is just amazing. And so, it's important that DOD doesn't get stagnant. We have to be up to date and learn about, what are the needs of our populations that we take care of? And it's important for us to also be aware of the different generations and what their needs and desires are. So, we got to keep up to date.

Bruce Moody:

So, the military, as we know, is incredibly diverse and that means ethnic traditions, faith traditions, personal idiosyncrasies, really. And we've been having ... it's impossible to go to a conference, a convention like this and not have conversations about, "Well, what do I want to do?" And people are saying, "Well, I would like to have this happen and that happen," and a lot of people don't even know what they don't know.

It's an amazing conference because there is the traditional casket and urn. But when you come to a convention like this, you realize that there is so much more. And the point, as it relates, I think, to this document, is to say; when a person dies, you automatically default to the traditional image of a funeral service, of a cemetery. But the person who has passed away may have a whole different set of ideas of how they should be memorialized, how they should pass along their memory to somebody else, and this document can capture that and give them a sense of direction on what to do.

Lisa Valentine:

Absolutely. I tell you that being at this conference, it also reminds me of things that I need to make sure that I tell my family, or just inform others about what is out there, what is available. And maybe one doesn't want the traditional funeral and so forth, they want to have a celebration of life, and what does that look like?

Bruce Moody:

In the conversations we've been having over the last couple of days, whether it's traditional, whether it's eclectic and modern; I think more than anything else, getting it right, doing what the individual had hoped for and knowing that you've gotten it right is a source of incredible peace. Would you talk to that?

Lisa Valentine:

Absolutely. It goes back to: How do you want to be remembered and how do you want to be memorialized? What is the dash? Because we have on our headstone, we have the ... if we even have a headstone because there's green, maybe you're into the green and you don't want to have the headstone and be marked and that kind of a thing. So, it's really individual. Because like I said, things are changing. But, what happened in that dash? How do you want to be remembered?

Bruce Moody:

All right. So, we'll wrap things up and really by encouraging people to really have a look at this checklist. It's got to be a great conversation starter. I mean, honestly. The things that are covered in this checklist could make for some really interesting conversation at an evening at the dinner table.

Lisa Valentine:

Absolutely. And so, it's very important to make sure that your affair is in order. And we hope that this product that we have at Military OneSource can be helpful to you and to

others, and we're always seeking for new ideas. So, if there's any ways that we can improve it, submit your ideas to the Military OneSource website, we're always interested.

Bruce Moody:

Absolutely. Lisa Valentine, thank you so much for joining. We're going to put a link in the program notes. It's conversations like this. I'll just wrap up by saying, of course, Military OneSource. We are an official resource of the Department of Defense, and we have a ton of resources and articles for military families to help them navigate military life. And that's why we want people to subscribe to this podcast because we do touch on so many different topics. And so, please subscribe so that you can get the most out of what Military OneSource has to offer you.

So, thanks for listening. I'm Bruce Moody. Take care. Bye-bye.