

# Planning Your Legacy

VA Survivors and Burial Benefits Kit

**“To care for him who shall have borne the battle  
and for his widow, and his orphan.”  
- Abraham Lincoln**

VA





# VA



## U.S. Department of Veterans Affairs

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The Department of Veterans Affairs (VA) offers this survivors and burial benefits kit as a source of pre-need planning information and record storage for Veterans and their families. This kit is intended to be used as a supplement to the [Summary of VA Dependents' and Survivors' Benefits](#) pamphlet<sup>1</sup>.

Included you will find *Planning for the Future*, a section to guide you through possible end-of-life and survivors' benefits eligibility. This section will tell you what benefits are offered and when and how you should apply.

For your added benefit, we have provided space for you to add your own personal information that can be kept in one location for your use, and for the use of loved ones. These sections identify the location of important documents, account numbers, military discharge documents, and marital information.

We have provided samples of completed forms that may be needed in the application process. VA forms change periodically; current versions can be found online at [www.va.gov/vaforms](http://www.va.gov/vaforms).

It is our sincere desire that the information and documents contained in this brochure assist you and your loved ones.

On behalf of a grateful nation, we respectfully thank all Veterans for their service.

Honor is not a word,  
but a way of life.

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<sup>1</sup> [www.benefits.va.gov/BENEFITS/benefits-summary/SummaryofVADependentsandSurvivorsBenefits.pdf](http://www.benefits.va.gov/BENEFITS/benefits-summary/SummaryofVADependentsandSurvivorsBenefits.pdf)

# Planning for the Future

VA has benefits designed to aid you and your family in preparing for the future. The documents in this packet will help guide you and your loved ones as you plan, and ensure your survivors know what benefits are available to them.

The following benefits are available to Veterans and their families:

## Pre-Need Eligibility for National Cemetery Burial or Memorialization

VA provides for a final resting place for eligible Veterans, spouses, and their eligible dependents, as well as a headstone or marker, a flag to drape the casket and a Presidential Memorial Certificate.

## Memorial or Burial Flags

A United States flag is provided, at no cost, to drape the casket or accompany the urn of a deceased Veteran who served honorably in the U. S. Armed Forces. U.S. Post Offices are the primary issuing point for burial flags. Each family of a decedent is entitled to one flag.

## Government Headstones or Markers

VA can provide a single headstone, columbarium niche cover, or a flat marker for a Veteran's final resting place (private, state or national cemeteries).

## Cemetery Medallions

VA can provide a medallion for use on a headstone or other memorial in a private cemetery to signify a decedent's status as Veteran. Multiple sizes are available.

## Presidential Memorial Certificates

VA can provide a Presidential Memorial Certificate (PMC) to the family of the deceased Veteran. A PMC is an engraved paper certificate signed by the current President.

## Burial Benefits and Burial Automatic Payments

Burial benefits are paid to a spouse, designated family member, or executor to partially offset the cost of burial expenses, plot costs, and transportation costs for a Veteran's remains. These benefits are paid at different rates based on whether the Veteran's death was service-connected or non-service connected.

If the Veteran was receiving VA benefits prior to passing and had a spouse of record, these benefits will usually be paid automatically to that spouse. However, additional funds may be paid, or payment made to another party, if an application is completed. Additional benefits, including a plot or interment allowance and transportation allowance, may also be payable.

An application for non-service-connected burial benefits must be submitted within two years from the date of death. There is no time limit for a service-connected death.

## Dependency and Indemnity Compensation

Dependency and Indemnity Compensation (DIC) is a monthly tax-free benefit provided to an eligible surviving spouse, dependent child(ren), and/or parent(s) of a Servicemember who died while on active duty, active duty for training, inactive duty training, or to survivors of Veterans who died from a service-connected disability(ies).

DIC benefits paid to surviving spouses and children are not income based. Parents DIC is an income-based benefit for parents who were financially dependent on a Servicemember or Veteran who died from a service-related cause.

## Dependents' Educational Assistance Program

The Dependents' Educational Assistance Program offers education and training opportunities to eligible dependents of Veterans who are permanently and totally disabled due to a service-related condition or of Servicemembers who died during active military service or Veterans who died as a result of a service-related condition.

## Marine Gunnery Sergeant John David Fry Scholarship

Provides children with financial support for tuition and fees, books and supplies, and housing. You may be eligible for up to 36 months of Fry Scholarship benefits if you are the child of a Servicemember who died during active duty after September 10, 2001. You must use your benefits between your 18th and 33rd birthdays. You may still be eligible if you are married.

The 15-year time limitation for using Post-9/11 GI Bill benefits is eliminated for qualifying dependents (Fry children who became eligible on or after January 1, 2013 and all Fry spouses).

## Survivors Pension

A tax-free monetary benefit payment to a low-income, un-remarried surviving spouse and/or eligible unmarried child(ren) of a deceased wartime Veteran, whose death is not service-related. Certain deductible expenses, such as an unreimbursed medical expense, may be used to reduce the survivor's countable income.

## Special Monthly Pension Benefits

Certain survivors who are eligible for VA pension benefits and require the aid and attendance of another person, or are housebound, may be eligible for additional monetary payment. These benefits are in addition to monthly pension, and they are not paid without eligibility to Pension.

## The Civilian Health and Medical Program of the Department of Veterans Affairs

A benefit that provides reimbursement for some medical expenses to certain surviving spouses or children of deceased Veterans, or spouses or children of Veterans with permanent and total service-connected disabilities who are not eligible for TRICARE.

### Home Loans

VA can help eligible unmarried surviving spouses (or those remarried after reaching age 57) become homeowners. This benefit may be used to help you buy, build, refinance, repair, and retain, a home for your own personal occupancy. You must be in receipt of Dependency and Indemnity Compensation (DIC) and the surviving spouse of a Veteran who died: a) on active or select reserve service, b) from a service-connected cause, or c) was rated totally disabled for a certain period of time preceding death. Other surviving spouses, include: a) spouse of a Servicemember missing in action or a prisoner of war, and b) spouse of a certain totally disabled Veteran whose disability may not have been the cause of death. For more information visit the [home loan web page](#)<sup>2</sup> or call 1-877-827-3702.

### Veterans Month of Death Benefits

If a Veteran who is receiving VA compensation or pension benefits passes away, their last month of benefits can be paid to their surviving spouse. This payment is usually automatic, but if it is not received, it can be claimed via a phone call to 1-800-827-1000, or through your Veterans Service Officer (VSO) or County Veterans Service Officer (CVSO).

For additional information regarding eligibility requirements see the [Summary of VA Dependents' and Survivors' Benefits](#)<sup>3</sup>.

### VA Life Insurance

As part of our mission to serve Servicemembers, Veterans, and their families, VA provides valuable life insurance benefits to give you the peace of mind that comes with knowing your family is protected. VA's life insurance programs were developed to provide financial security for your family given the extraordinary risks involved in military service.

VA has several different insurance programs. To get the insurance benefits you've earned, explore your options, manage your policy, update your life insurance beneficiary designation(s), or file claims, visit [www.benefits.va.gov/insurance](http://www.benefits.va.gov/insurance).

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<sup>2</sup> [www.benefits.va.gov/homeloans/](http://www.benefits.va.gov/homeloans/)

<sup>3</sup> [www.benefits.va.gov/BENEFITS/benefits-summary/SummaryofVADependentsandSurvivorsBenefits.pdf](http://www.benefits.va.gov/BENEFITS/benefits-summary/SummaryofVADependentsandSurvivorsBenefits.pdf)

## What to Do, and When...

Preparing for the passing of a loved one, or even oneself, can be a difficult and confusing time. The following informs you of what you may need to do, and when, to ensure your survivors have the information and documents needed to obtain the benefits for which they may be entitled.

### For the Veteran, when discussing your final wishes with your loved ones:

- Discuss your military service and any VA disability rating information with your family and if possible, locate copies of your military separation document(s), such as your DD214.
- Use VA-Form 21-686C to document you and your spouse's marital histories. This information may be needed if your spouse applies for VA benefits after your passing.
- Discuss your final wishes regarding your remains. If you wish to be buried in a national cemetery after your passing, consider applying now for pre-need burial eligibility.
- Be sure to complete and annually review your life insurance beneficiary designation(s), which will make it much easier to file a claim and receive benefits quickly.

### For the Veteran's family, as the Veteran is approaching end of life:

- Speak to the Veteran's doctor about how to obtain copies of medical records before and after the Veteran's passing, in case they may be needed in the future.
- Discuss with the Veteran where and when they have received treatment for any medical conditions which you believe may have been incurred in, or exacerbated by, their military service.
- If you believe the Veteran may be entering into their period of final illness, begin keeping a record of any medical expenses related to that final illness.
- If the Veteran wishes to be interred in a national cemetery, locate their pre-need burial approval (if they applied), or clarify their wishes as to where they would like to be interred.

### For the Veteran's parents, spouse, or dependent children, after the Veteran's passing:

- Consider if you wish to apply for VA Survivors Pension or DIC.
- If the Veteran had a VA Life Insurance policy, or other policy, prepare and submit a claim with required supporting documentation.
- If you have a medical condition, disease, or injury which necessitates the aid and attendance of another person in performing your activities of daily life, or are housebound, have your physician complete a statement outlining your medical condition.
- If you believe the Veteran's death was related to a condition incurred during military service, or exacerbated by military service, obtain copies of any private medical records from the Veteran's physician (VA hospital records and military medical records can be obtained by VA).

## For Help With Your Benefits...

Applying for VA benefits, especially at the time of the passing of a loved one, can be difficult and confusing. However, several organizations exist to help you navigate this process, usually cost-free. Here are a few places you can go for help with the claims process:

### County Veterans Service Officers

Most local governments in the United States have a designated County Veterans Service Office or Agency, staffed by County Veterans Service Officers (or “CVSOs”). These officers operate independent of VA, but receive VA training, and can act as liaisons between claimants and VA.

They are usually well versed in benefits eligibility requirements and claims processing and are available to help you locally. To find your local CVSO, you can use the directory found online at this URL:

[www.ebenefits.va.gov/ebenefits/vso-search](http://www.ebenefits.va.gov/ebenefits/vso-search).

### Veterans Service Organizations

Veterans Service Organizations (VSO) are private groups dedicated to providing Veterans and their families with various services, including assistance with claims processing. These groups can help you by representing you before VA and can assist you in completing your claim. While these groups are not formally connected to government or VA, they receive VA accreditation and training, and do not charge for their services. To find a VSO, you can use the directory found online at this URL:

[www.ebenefits.va.gov/ebenefits/vso-search](http://www.ebenefits.va.gov/ebenefits/vso-search)

### U.S. National Archives and Records Administration (NARA)

Veterans and next of kin can obtain free copies of a DD-214 and other service records. Fax or mail Standard Form [SF 180](#) (Request Pertaining to Military Records), to the address indicated on the *back* of the form, or fill out [online](#)<sup>4</sup>. Or call NARA customer service staff at **314-801-0800** if you have questions or require same-day service (e.g. upcoming surgery or funeral).

### VA Contact Information

If you wish to speak directly to a VA representative, contact VA at the following phone numbers:

- For burial, Survivors Pension, DIC, or other benefits: 1-800-827-1000
- For the status of VA headstones and markers: 1-800-697-6947
- For obtaining bereavement counseling: 1-202-461-6530
- For Telecommunications Device for the Deaf services, dial 711
- For VA Life Insurance information related to Servicemembers’ Group Life Insurance, Traumatic Servicemembers’ Group Life Insurance, Family Servicemembers’ Group Life Insurance, and Veterans’ Group Life Insurance: 1-800-419-7473
- All other VA Life Insurance Programs: 1-800-669-8477

***If you or somebody you know is experiencing a crisis, you can contact VA’s Veterans Crisis Line at 1-800-273-TALK (1-800-273-8255).***

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<sup>4</sup> <https://www.archives.gov/veterans/military-service-records>



# Record of Personal Affairs

The following is a guide to assist you in consolidating information that will be beneficial for your loved ones at the time of your passing. This information is for your personal use only and should not be submitted to VA.

Be sure to keep the following information in a secure location, as it will contain personally identifiable information.

## My Record of Personal Affairs:

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First	Middle	Last
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Retired Military Grade	Branch of Service	SSN
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Street Address	City/State	Zip Code
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Service Number	Date of Entry and Date, Type, and Character of separated on from military
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## Date and Place of Birth:

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City, State, Zip	Month/Day/Year
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## Parents' Information:

Father

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First	Middle	Last
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Mother

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First	Middle	Last
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## Children:

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First	Middle	Last	DOB	SSN
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First	Middle	Last	DOB	SSN
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First	Middle	Last	DOB	SSN
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First	Middle	Last	DOB	SSN
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## Your Marital History:

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Your spouse's name

Spouse's SSN

Spouse's birthdate

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Location of marriage (city, state/country)

Date of marriage

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Your prior spouse's name (if applicable)

Date of prior marriage

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Location of prior marriage (city, state/country)

Date/place/circumstance of end of marriage (if applicable)

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Your *total* number of marriages

Your spouse's *total* number of marriages

**Trusted Associates:** List a personal lawyer or trusted friend who may be consulted in regard to personal or business affairs.

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First

Middle

Last

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Address

Phone

Email

**Location of Family Records:** List the physical location(s) where your family can find important documentation. Documents can include; birth certificates, adoption paperwork, marriage certificate, naturalization papers, divorce decrees, death certificates, tax documents, etc.

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**Your Will:** Do you have a will? Circle one: **Yes** **No**

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Location of Will Executor's name & contact information

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Lawyer's name and contact information

**Power of Attorney:** Personal, not VA assigned. Do you have a POA? Circle one: **Yes** **No**

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Name of POA Location of document

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City, state zip Phone

**Bank Accounts:** Include name of financial institution, name of joint account holders, account number, and phone number.

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**Credit Cards:** Include name and phone number.

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**Location of Important Financial Documents:** Include savings bonds, stocks, mutual funds, 401K, safe deposit box, etc.

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**Annuities:** Government and private.

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Payable to (full name)	Monthly Amount
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Address (city, state, zip)	Phone
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**Employer / Membership:** If employed (or retired), list any survivor benefit that may be payable.

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Employer	Survivor Benefit
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City, state, zip	Phone
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**Membership in Organizations or Associations:** List any organizations with which you are affiliated that may assist your survivors. Also list other local Veteran Service Organizations which may be of assistance.

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**Veterans Affairs Record:** Survivors should contact VA at 1-800-827-1000 to report a death and discontinue benefits.

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VA claim number (if applicable)

**Social Security:** Survivors should contact local SSA office to see if burial benefits are available.

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Social Security monthly payment	Location of SSA papers
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**Retirement Pay:** Civilian and/or military

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Finance center	Current deposit location
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Beneficiary or any unpaid retired pay	Relationship	Phone
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## Military Documents:

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Location of DD-214 (separation papers)

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Location of other military documents (awards, medical etc.)

## Military Survivor/Casualty Assistance Officer: Active and retired military personnel.

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Name and Location

Phone

## Funeral and Burial Arrangements:

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Funeral Location

Funeral director

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Address

Phone

## Church, Clergy or Desired Officiant:

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Clergyperson/Officiant

Office Phone

Home Phone

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Name of institution/organization

Address

## For Those Who Wish to be interred in a VA National Cemetery:

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Date of birth

Social Security Number

Rank / Branch of service

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Date of entry into service

Date of separation

Service number

## Other Suggestions or Wishes:

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**Wishes for Burial and Funeral Service Arrangements:**

\_\_\_\_\_  
Name of resting place Phone

\_\_\_\_\_  
Hymns, psalms, scriptures, poetry, or special requests

\_\_\_\_\_  
Flowers / memorial (if in lieu of Flowers)

\_\_\_\_\_  
Memorial and remembrances Indicate emblem choice for VA Form 40-1330

**Do you have a pre-paid burial/plot? Circle one: Yes No**

**Pallbearers:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Special instructions:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Obituary Biography:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## Additional Considerations

Please ensure the following are conducted through proper legal channels.

- **Do you have a “do not resuscitate” (DNR) order? Yes No**
- **Do you have a living will / health directive? Yes No**

## Checklist of Important Documents

The following may be needed by survivors:

- Death Certificate (12 copies recommended) Location:**\_\_\_\_\_
- Deceased’s Birth Certificate Location:**\_\_\_\_\_
- Spouse’s Birth Certificate Location:**\_\_\_\_\_
- Minor or Adult Dependent Children’s Birth Certificate(s) Location:**\_\_\_\_\_
- Marriage Certificate Location:**\_\_\_\_\_
- Another Important Documents Location:**\_\_\_\_\_

## Other resources and organizations that can assist you:





# Veterans Crisis Line

1-800-273-8255



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**VA**



**U.S. Department of Veterans Affairs**  
Veterans Benefits Administration