




Veterans Healthy Minds Advisory Council - South Texas
"Helping Veterans, Help Themselves"

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



U.S. Department of Veterans Affairs

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.

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.

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.**

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 their 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 deceased Service member or Veteran.

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 of 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 service members 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 net worth and income-based benefit paid to un-remarried surviving spouses and children of a wartime Veteran whose death is not service related. Survivors Pension pays a maximum annual amount, which is offset by the beneficiary's income from other sources. Certain deductible expenses, such as an unreimbursed medical expense, may be used to reduce the survivor's countable income.

Special Monthly Pension Benefits

This is additional funds available to survivors in receipt of pension who are, due to a mental or physical disability, blind, require the aid and attendance of another person in performing daily activities, or are permanently housebound. Qualifying for this benefit requires medical evidence from a doctor or specialist.

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

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

Home Loans

VA helps eligible surviving spouses become homeowners. This benefit may be used to help you buy, build, repair, retain, or adapt a home for your own personal occupancy.

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, however, if it is not received, it can be claimed via a phone call to 1-800-827-1000, or through your County Veterans Service Officer (CVSO).

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

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 with your family and if possible, locate copies of your military separation document(s), such as your DD214.
- Document your spouse's and your 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.

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 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 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).

How to Apply for Benefits

When applying for benefits there are basic forms that must be completed. This page lists the forms required to apply for various VA benefits, as well as what additional documents may be required to show eligibility. This booklet includes copies of the VA forms listed, so you can familiarize yourself with them now. You can find current versions online at www.va.gov/vaforms

IF:	USE FORM:	ADDITIONAL DOCUMENTS THAT MAY BE REQUIRED
...you wish to apply for pre-need eligibility in a National Cemetery	VA Form 40-10007	<ul style="list-style-type: none"> • Veteran's Military Discharge
...you wish to apply for a: -Burial Flag -Government Medallion, or -Headstone/Marker	VA Form 27-2008 VA Form 40-1330M VA Form 40-1330	<ul style="list-style-type: none"> • Veteran's Military Discharge
...you wish to apply for burial benefits	VA Form 21P-530	<ul style="list-style-type: none"> • Veteran's Military Discharge • Death Certificate • Transportation Invoice
...you wish to apply for DIC benefits for the Veteran's: -surviving spouse/child(ren) -surviving parent(s) -surviving spouse/child(ren) as a result of combat-related death	VA Form 21-534EZ VA Form 21P-535 VA Form 21P-534a	<ul style="list-style-type: none"> • Veteran's Military Discharge • Death Certificate • Declaration of Status of Dependents (VA Form 21-686c)
...you wish to apply for a: Survivors Pension (<i>*with aid and attendance or housebound benefits</i>)	VA Form 21P-534EZ	<ul style="list-style-type: none"> • Veteran's Military Discharge • Death Certificate • <i>*Examination for Housebound Status or Permanent Need for Aid and Attendance (VA Form 21-2680)</i>

IF:	USE FORM:	ADDITIONAL DOCUMENTS THAT MAY BE REQUIRED
...you wish to apply for The Civilian Health and Medical Program of the Department of Veterans Affairs (CHAMPVA)	VA Form 10-10d	• Veteran’s Military Discharge
...you wish to apply for a: -Dependents’ Educational Assistance Program (DEA) -Marine Gunnery Sergeant John David Fry Scholarship Post 9/11 GI Bill	VA Form 22-5490	• Veteran’s Military Discharge
...you wish to apply for home loan	VA Form 26-1817	• Veteran’s Military Discharge

For Help With Your Benefits

Applying for VA benefits, especially at the time of 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:

CVSOs

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, claim processing, and are available to help you locally. To find your local CVSO, you can use the directory found online at this URL: <https://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 a number of 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: <https://www.ebenefits.va.gov/ebenefits/vso-search>.

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: 1-877-294-6380.
- 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.

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).

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:

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 separation from military
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Date and Place of Birth:

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

Father

First	Middle	Last
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Mother

First	Middle	Last
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Children:

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:

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
--	------------------------

Location of prior marriage (city, state/country)	Date/place/circumstance of end of marriage (if applicable)
--	--

Your <i>total</i> number of marriages	Your spouse's <i>total</i> number of marriages
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Trusted Associates: List a personal lawyer or trusted friend who may be consulted in regard to personal or business affairs.

First	Middle	Last
-------	--------	------

Address	Phone	Email
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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.

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

Location of Will

Executor's name & contact information

Lawyer's name and contact information

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

Name of POA

Location of document

City, state zip

Phone

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

Credit Cards: Include name and phone number.

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

Real Estate: If your family needs any assistance with your home loan, they can contact a VA Regional Loan Center at 1-877-827-3702 for assistance. You do not need a VA Loan to request assistance.

Primary Residence (address)

Mortgage Institution (If applicable)

Location of physical Mortgage note

Property insurance (include company and policy number)

Investment Properties: Include address(es) and location of deed/note.

Vehicles owned: List the year, make, model and vehicle ID number (VIN) for each vehicle you own.

Life Insurance:

Circle the following types of insurance you have: **Government** **Life** **Mortgage**

List the insurance company, policy number, face value and payment option below.

Other Insurance: List any health, vehicle, or other insurance you have.

Annuities: Government and private.

Payable to (full name)

Monthly Amount

Address (city, state, zip)

Phone

Employer / Membership: If employed (or retired), list any survivor benefit that may be payable.

Employer

Survivor Benefit

City, state, zip

Phone

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.

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

VA claim number (if applicable)

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

Social Security monthly payment

Location of SSA papers

Retirement Pay: Civilian and/or military

Finance center

Current deposit location

Beneficiary or any unpaid retired pay

Relationship

Phone

Military Documents:

Location of DD-214 (separation papers)

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

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

Name and Location

Phone

Funeral and Burial Arrangements:

Funeral Location

Funeral director

Address

Phone

Church, Clergy or Desired Officiant:

Clergyperson/Officiant

Office Phone

Home Phone

Name of institution/organization

Address

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

Date of birth

Social Security Number

Rank / Branch of service

Date of entry into service

Date of separation

Service number

Other Suggestions or Wishes:

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 owers)

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: _____
- Other Important Documents** Location: _____

Other resources and organizations that can assist you:

Ft Sam Houston Casualty Assistance Center

PHONE: (210) 221-1702 /-1752 /-0051 /-1780 /-2667

EMAIL: usanny.jbsa.asa.mbx.casualty-assistance-center

JBSA-Lackland

(210) 671-3243 or 671-3216

JBSA-Randolph

(210) 652-2104 or 652-3633

Contact the following agencies (if they apply):

***VA Office: (800) 827-1000**

***Retired Pay: (800)-321-1080**

***Annuity Pay: (800) 435-3396**

***Social Security Office: (800) 772-1213**

*** ID Card: (210) 221-2278**