

Veterans Healthy Minds Advisory Council - South Texas Family Readiness Questionnaire

- I have a Will
- I have a Power of Attorney
- I have a Medical Power of Attorney
- I have a Living Will
- I know the location of the following documents:
 - Everything in my house worth \$100 or more
 - Insurance Policie(s) Life/Homeowners/Renters/etc
 - A list of financial records
 - Bank accounts
 - Investments
- My valuable documents are located in a safe place
 - Includes Social Security numbers
 - Driver's license number
 - VA claim number
 - Birth certificate(s)
 - Names and Phone numbers of family members
- I have designated someone to have access to my safe deposit box
- The Birth Certificates/death certificates, of all my family members are in a safe place.
- The title to all my vehicles, and boats, motorcycles, etc. are listed in a personal family Inventory
- At this time, I have designated someone to take care of my financial obligations, business affairs, if I am incapacitated for a period of time
 - Can this designated person sign checks and are they listed on your bank account(s)
- My safe deposit key location is known by a person I trust
- I know where the military members DD Form 214 is located

More resource information may be located at : [https://veteranshealthybrainsadvisorycouncilsouthtexas.com/ptsd-resources/VA Survivor & Burial Benefits and Informational Resource Kit](https://veteranshealthybrainsadvisorycouncilsouthtexas.com/ptsd-resources/VA-Survivor-Burial-Benefits-and-Informational-Resource-Kit)

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Following is an outline of items that should be included in your inventory of personal documents:

Family Members

Name(s)
Social Security Number(s)
Driver's License Number(s)/State(s)

Personal Records

Passport(s) where stored	Divorce(s) (if applicable)
Green card and Naturalization records, where stored	Death(s) certificates
Marriage license/where stored	Military (DD Form 214)
Birth Certificate(s)	Medical Power.of Attorney
Fingerprint Records, where stored	General Power of Attorney
Religious Records, where stored	Living Will - where stored

Bank Information

Bank Name	Money Market Acct. No.
Branch/Address	Certificate(s) of Deposit
Area Code - Phone Number	Individual Retirement Account Number(s)
Checking Account Number	Personal Identification Number (PIN)
Savings Account Number	

Safety Deposit Boxes

Bank Name/Branch/ Address	Person(s) with Access
Area Code - Phone Number	

Bonds

Bond Name/Investment Company	(Area Code) Phone Number
Address	Account Number(s)

Mutual Funds

Fund Name/Investment Company
Address
(area Code) phone number
Account Numbers

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Stocks

Stock Name/Investment Company
Address
(Area Code) Phone Number Account Number(s)

Pensions/Annuities/Retirement Accounts

Name/Address
(Area Code) Phone number

Wills/Trusts

Name (Area Code) Phone Number
Document Location of Original/Copies
Lawyer/Address

Car Information

Make/Model/Year Finance Company/Loan Number
License Plate Number/State Address
Vehicle Identification Number (Area Code) Phone Number

Car Insurance

Carrier Policy Number
Address Location of Policy
(Area Code) Phone Number

Life Insurance

Name of Insured Policy Number
Carrier/Agent Location of Policy
Address
(Area Code) Phone Number

Homeowners/Renters Insurance

Carrier/Agent

Address
(Area Code) Phone Number
Policy Number
Location of Policy

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Disability/Long Term Care/Supplemental Medicare

Name of Insured	Policy Number
Carrier/Agent	Location of Policy
Address	Personal Identification Number (PIN)
(Area Code) Phone Number	

Credit Cards

Type of Card(s)	Address
Expiration Date	(Area Code) Phone Number
Account Number	

RETIREE CASUALTY ASSISTANCE CHECKLIST

Retiree's Name	Place of Birth
Social Security Number	
Religious Preference	Date of Birth

DOCUMENTS NEEDED TO CLAIM DEATH BENEFITS

DD Form 214 or retirement orders	Copy of divorce decrees or death certificates from previous marriages (if applicable, retiree and spouse)
Copy of marriage certificate	
Copy of death certificate	
Copy of birth certificate for dependent children	

RETIREMENT PAY DATA (SEE PAY STATEMENT)

Retired Pay as Of Date: _____
Gross Pay: \$ _____
Net Pay: \$ _____
VA Disability Pay: \$ _____

Survivor Benefit Information(See Retirement Pay Statement)

Survivor Benefit Annuity before age of 62 \$ _____

Annuity after age 62 \$ _____

Veterans Administration Data (if applicable)

VA Claim# _____
VA Insurance Policy/File# _____

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Other resources and organizations that may assist you:

Casualty Assistance Representative (CAR)

Provides prompt and accurate casualty reporting, dignified and humane casualty notifications and ensures efficient, thorough and compassionate follow-on assistance to the next of kin for as long as it is needed

- JBSA – Ft Sam Houston (210) 808-0171
- JBSA – Lackland (210) 671-3243 or (210) 671-3216
- JBSA – Randolph (210) 652-2104 or (210) 652-3633

Ft Sam Houston Casualty Assistance Office

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

Contact the following agencies (if they apply) as soon as possible

- VA Office: (800) 827-1000
- Retired Pay: (800) 327-1080
- Annuity Pay: (800) 435-3396
- Social Security: (800) 772-1213
- ID Card Section: (210) 221-2278

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