VA | U.S. Department of Veterans Affairs
Veterans Health Administration

What to Do When a Veteran Passes Away

The Department of Veterans Affairs (VA) realizes the loss of a loved one is a difficult experience.

VA has established a streamlined process for families, executors and legal representatives to follow to notify VA about the death of a Veteran enrolled in the VA health care system.

Why should I notify VA about the death of an enrolled Veteran?

- Notifying VA limits the chance for others to falsely use the Veteran's identity.
- By updating the Veteran's information, you will reduce the likelihood of VA continuing to send you correspondence about VA benefits, services and bills.
- You will be helping VA to maintain up-to-date records, which will enhance the agency's efforts to better distribute services to the Veteran community.

The Steps for Notifying VA are Simple and Easy to Follow

1. Step one is for the next-of-kin and/or legally authorized representative under State law to retrieve an official copy of the Veteran's death certificate.
2. Step two is to submit the death certificate to VA by:
   a. hand delivering or mailing a copy of the death certificate to the Office of Decedent Affairs at the VA medical facility where the Veteran was receiving healthcare benefits, or
   b. contacting the VA Health Resource Center at 1-877-222-VETS (8387) for additional instructions.

Burial Benefits

Effective July 7, 2014: VA is changing its monetary burial benefits regulations to simplify the program and pay eligible survivors more quickly and efficiently. These regulations will authorize VA to pay, without a written application, most eligible surviving spouse basic monetary burial benefits at the maximum amount authorized in law through automated systems rather than reimbursing them for the actual costs incurred.

- Under the current regulations, VA pays for burial and funeral expenses on a reimbursement basis, which required survivors to submit receipts for relatively small one-time payments that VA generally pays at the maximum amount permitted by law.
- The new burial regulations will permit VA to pay, at a flat rate, burial and plot or interment allowances thereby enabling VA to automate payment of burial benefits to most eligible surviving spouses and more efficiently process other burial benefit claims.
- The burial allowance for a non-service-connected death is $300, and $2,000 for a death connected to military service.

Benefit

Service-related Death

VA will pay up to $2,000 towards burial expenses for deaths on or after September 11, 2001, or up to $1,500 for deaths prior to September 11, 2001. If the Veteran is buried in a VA national cemetery, some or all of the cost of transporting the deceased may be reimbursed.

Non-service-related Death

VA will pay up to $796 towards burial and funeral expenses for deaths on or after October 1, 2019 (if hospitalized by VA at time of death), or $300 toward burial and funeral expenses (if not hospitalized by VA at time of death), and a $796 plot-interment allowance (if not buried in a national cemetery). For deaths on or after December 1, 2001, but before October 1, 2001, VA will pay up to $300 toward burial and funeral expenses and a $300 plot-interment allowance. For deaths on or after April 1, 1988 but before October 1, 2011, VA will pay $300 toward burial and funeral expenses (for Veterans hospitalized by VA at the time of death).

An annual increase in burial and plot allowances for deaths occurring after October 1, 2011 began in fiscal year 2013 based on the Consumer Price Index for the preceding 12-month period. The Veteran

Eligibility Requirements

- You paid for a Veteran's burial or funeral, AND
- You have not been reimbursed by another government agency or some other source, such as the deceased Veteran's employer, AND
- The Veteran was discharged under conditions other than dishonorable, AND
    - The Veteran died because of a service-related disability, AND
    - The Veteran was receiving VA pension or compensation at the time of death, OR
    - The Veteran was entitled to receive VA pension or compensation, but decided not to reduce his/her military retirement or disability pay, OR
    - The Veteran died while hospitalized by VA, or while receiving care under VA contact at a non-VA facility, OR
    - The Veteran died while traveling under proper authorization and at VA expense to or from a specified place for the purpose of examination, treatment, or care, OR
    - The Veteran had an original or reopened claim pending at the time of death and has been found entitled to compensation or pension from a date prior to the date of death, OR
    - The Veteran died on or after October 9, 1996, while a patient at a VA-approved state nursing home.

NOTE: VA does not pay burial benefits if the deceased:

- Died during active military service, OR
- Was a member of Congress who died while holding office, OR
- Was a Federal Prisoner

Evidence Requirements:

- Acceptable proof of death as specified in 38 CFR 3.211.. AND
- Receipted bills that show you made payment in whole or part, OR
- A statement of account, preferably on the printed billhead of the funeral director or cemetery owner. The statement of account must show:
    - The name of the deceased Veteran for whom the services and merchandise were furnished, AND
    - The nature and cost of services and merchandise, AND
    - All credits, AND
    - The amount of the unpaid balance, if any.

How to Apply

- You can apply **online at Vets.gov,** OR
- To submit a paper application, download and complete **VA Form 21P-530, *Application for Burial Allowance*** and mail it to the **Pension Management Center** that services your state, OR
- Work with an **accredited representative**, OR
- You may also go to your **local regional benefit office** and turn in your application for processing.

Additional Information

Other information regarding VA burial benefits such as flags, headstones, and markers is provided by the **National Cemetery Administration.**

PLEASE SEE THE ATTACHED PRESIDENTIAL MEMORIAL CERTIFICATE REQUEST FORM:

Form Approved, OMB No. 2900-0567
Expiration Date: Sept. 30, 2023
Respondent Burden: 3 Minutes

VA U.S. Department of Veterans Affairs

PRESIDENTIAL MEMORIAL CERTIFICATE REQUEST FORM

RESPONDENT BURDEN: Public reporting burden for this collection of information is estimated to average three minutes per response, including the time to review instructions, search existing data sources, gather the necessary data, and complete and review the collection of information. The obligation to respond is voluntary and not required to obtain or retain benefits. Statutory authority for the Presidential Memorial Certificate (PMC) Program is 38 U.S.C. 112. The information requested is approved under OMB Control Number 2900-0567, and is necessary to allow eligible recipients (next of kin, other relatives or friends) to request PMC.

The National Cemetery Administration does not give, sell or transfer any personal information outside of the agency. The Department of Veterans Affairs (VA) may not conduct or sponsor, and you are not required to respond to this collection of information unless it displays a valid OMB Control Number. Responding to this collection is voluntary. Send comments regarding this burden estimate or any other aspects of this collection of information, including suggestions for reducing this burden, to VA Clearance Officer (005R1B), 810 Vermont Avenue NW, Washington, DC 20420. **SEND COMMENTS ONLY.** *Please do not send applications for benefits to this address.*

SECTION I - INSTRUCTIONS FOR COMPLETING VA FORM 40-0247, PRESIDENTIAL MEMORIAL CERTIFICATE REQUEST FORM

Military/Discharge Documents: VA recommends that you attach photocopies of readily available supporting documents so that we can make the determination quickly. Documents may include the most recent discharge document (DD Form 214) showing active duty service records other than for training purposes, or active duty for a minimum of 24 continuous months for enlisted Servicemembers after September 7, 1980; for officers, after October 16, 1981, or the full period for which the person was called to active duty. If you are unable to locate copies of military records, apply anyway, as VA will attempt to obtain records necessary to make a determination.

Name of Veteran: DO NOT include nicknames, military rank or civilian title(s).

Name and Mailing Address of Person Requesting Certificate: Provide the full name and complete mailing address to avoid delays in delivery.

We strongly recommend you complete this form online (http://www.cem.va.gov/pmc.asp) and print and sign before you submit your request.

Complete a new VA Form 40-0247 for each additional address where certificates will be mailed to.

Privacy Act Information: VA considers the responses you submit confidential (38 U.S.C. 5701). VA may only disclose this information outside the VA if the disclosure is authorized under the Privacy Act, including the routine uses identified in the VA system of records, 175VA41A published in the Federal Register.

SECTION II - VETERAN/SERVICEMEMBER INFORMATION

1. NAME OF VETERAN *(First, Middle, Last)*

2. VETERAN SSN OR SERVICE NUMBER OR VA FILE NUMBER *(Required)*

3. RACE OR ETHNICITY *(You may select more than one. Information will be used for statistical purposes only.)*

☐ AMERICAN INDIAN OR ALASKA NATIVE ☐ ASIAN OR ASIAN AMERICAN ☐ BLACK OR AFRICAN AMERICAN ☐ WHITE
☐ HISPANIC OR LATINO ☐ NOT HISPANIC OR LATINO ☐ NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER

4. SEX *(Information will be used for statistical purposes only.)*

☐ MALE ☐ FEMALE ☐ UNSPECIFIED OR ANOTHER GENDER IDENTITY

5. DATE OF BIRTH

6. DATE OF DEATH

SECTION III - PERSON REQUESTING CERTIFICATE INFORMATION

7. NAME OF PERSON REQUESTING CERTIFICATE

8. MAILING ADDRESS OF PERSON REQUESTING CERTIFICATE

9. HOME OR WORK TELEPHONE NUMBER *(Include area code)*

10. REQUESTOR EMAIL ADDRESS

11. NUMBER OF CERTIFICATES REQUESTED

SECTION IV - CERTIFICATION AND SIGNATURE

CERTIFICATION: I certify, to the best of my knowledge, that the decedent has never committed a serious crime, such as murder or other offense that could have resulted in imprisonment for life, has never been convicted of a serious crime, and has never been convicted of a sexual offense for which the decedent was sentenced to a minimum of life imprisonment.

12. SIGNATURE OF PERSON REQUESTING CERTIFICATE *(Required)*

SECTION V - SUBMITTING FORM AND DOCUMENTS

ELECTRONICALLY submit your claim and supporting documents by using Quick Submit at **access.va.gov**. You will be instructed to register during your first sign-on attempt.

Or

MAIL your claim and supporting documents to:
NCA FP Evidence Intake Center
PO Box 5237
Janesville, WI 53547

Or

FAX claim and supporting documents to:
1 (800) 455-7143

(The blocks below are for official use only)

13. CASE MANAGER NAME

14. PMC ID NUMBER

15. CASE MANAGER EMAIL

ALL VERSIONS OF THIS FORM DATED BEFORE MAY 2013 WILL NOT BE ACCEPTED OR PROCESSED.

What to do when a loved one dies

A survivor's checklist.

IMMEDIATELY FOLLOWING THE DEATH, YOU SHOULD:

❑ 1. Contact the funeral home to take your loved one into their care.
❑ 2. Contact your minister.
❑ 3. Alert immediate family members and close friends.
❑ 4. If employed, contact the deceased's employer.
❑ 5. Alert the executor of your loved one's Will.
❑ 6. Notify religious, fraternal, and civic organizations that your loved one was a member of.
❑ 7. Notify your attorney regarding the probate of the estate.
❑ 8. Arrange for the care of any dependents.
❑ 9. If the deceased had any pets, arrange for their immediate care.
❑ 10. Remove any valuables from the deceased's home, secure the residence, and take steps to make the home appear to be occupied (for example, use of lamp timers).
❑ 11. Arrange for the disposal of any perishables left in the deceased's home- such as food, refrigerated items, and existing refuse.
❑ 12. Alert the Post Office to forward the deceased's mail.
❑ 13. Locate loved one's important documents:

- ❑ Will
- ❑ Birth certificate
- ❑ Social Security card
- ❑ Marriage license
- ❑ Military discharge papers (DD-214)
- ❑ Deed to burial property
- ❑ Copy of funeral prearrangements
- ❑ Life insurance policies

14. Compile the following information that the funeral home will need in order to finalize the death certificate:

- ❑ Deceased's first, middle, and last name
- ❑ Deceased's Maiden Name (if applicable)x Deceased's Home Address
- ❑ Deceased's Social Security Number
- ❑ Deceased's Date of Birth
- ❑ Deceased's Date of Death
- ❑ Deceased's Age
- ❑ Deceased's Gender
- ❑ Race/Ethnicity
- ❑ Marital Status
- ❑ Spouse's first and last name
- ❑ Deceased's highest level of education attained
- ❑ Deceased's Occupation
- ❑ Deceased's Place of Birth (City and State) Deceased's Father's Name
- ❑ Birth City
- ❑ Birth State Deceased's Mother's Name
- ❑ Birth City
- ❑ Birth State If your loved one was a Veteran
- ❑ Entered Service Date
- ❑ Entered Service Place
- ❑ Service Number
- ❑ Separated from Service Date
- ❑ Separated from Service Place
- ❑ Grade, Rank or Rating
- ❑ Organization and Branch of Service

WITHIN THE NEXT FEW WEEKS OF THE DEATH, YOU SHOULD:

❑ 1. Consult with an attorney about probate.

❑ 2. Meet with an accountant to discuss estate taxes

❑Schedule appointment with their financial advisor.

❑ 3. File claims with life insurance companies.

❑ 4. Contact the Social Security Administration and other government offices that may have been making payments to the decedent. If the decedent was your spouse, inquire about your eligibility for new benefits.

❑ 5. Notify the Registrar of Voters.

❑ 6. If the deceased's home is unoccupied, cancel unnecessary home services, such as newspaper delivery, cable service, etc.

❑ 7. Cancel deceased's prescriptions.

❑ 8. Contact the Department of Motor Vehicles to cancel deceased drivers license and transfer titles of all registered vehicles.

❑ 9. If your loved one was a veteran, inquire about benefits that you may be entitled to through the VA.

❑ 10. Contact the deceased's employer. Inquire about any 401 (k), pension, or company benefits that the decedent may be entitled to.

❑ 11. Notify all 3 credit reporting agencies.

❑ 12. Obtain a current copy of the deceased's credit report.

❑ 13. If the death was accidental, verify whether benefits are available on existing insurance policies.

❑ 14. Check for any life insurance benefits available through existing credit card or loan accounts.

❑ 15. File any outstanding claims for health insurance or Medicare

❑ 16. Obtain copies of deceased's outstanding bills.

☐ 17. Locate and/or obtain other important paperwork of the necessary for the settlement of their estate:

- ☐ At least 12 copies of the certified Death Certificates
- ☐ Real estate deeds and titles
- ☐ Stock certificates
- ☐ Real estate titles
- ☐ Loan paperwork
- ☐ Bank and retirement account statements
- ☐ Last 4 years of tax returns

☐ 18. Advise all creditors in writing that a death has occurred.

☐ 19. Change ownership of assets and lines of credit.

☐ 20. Update your Will.

☐ 21. Update beneficiaries on your life insurance policies, if necessary.

☐ 22. Send acknowledgement cards for flowers, donations, food, kindness. Also remember to thank pallbearers.

☐ 23. Organize and distribute decedent's personal belongings.

☐ 24. Remove loved one's from marketing and mailing lists

IMPORTANT CONTACT INFORMATION:

<u>DEPARTMENT OF VETERAN'S AFFAIRS</u>
1-800-827-1000
www.vba.va.gov/VBA

<u>SOCIAL SECURITY ADMINISTRATION</u>
1-800-772-1213
www.ssa.gov/pgm/links_survivor.htm

<u>CREDIT REPORTING AGENCIES</u>
EQUIFAX
1-800-685-1111
• www.Equifax.com
TRANS UNION
1-800-888-4213
• www.TransUnion.com
EXPERIAN
1-888-397-3742
• www.Experain.com

33-Point Estate Executor Checklist

Acting as the executor of an estate requires significant attention to detail to ensure you're following the intentions of your loved one or friend while also finalizing their financial affairs.

This Checklist can serve as a starting point to help you understand key responsibilities and keep track of items which still need to be addressed. Since this Checklist is not intended to include every task, feel free to add more tasks at the end to help you stay on top of other considerations for your family member's estate. Be sure to consult with your network of professionals to be sure you've thoroughly completed your duties and responsibilities—and within necessary timelines.

Task*	Timeline*	Complete
1. Notify family members and friends of loved one's passing	*First week*	☐
2. Work with family members to make funeral arrangements	*First week*	☐
3. Notify employer of person's passing	*First week*	☐
4. Locate will and trust documents	*First week*	☐
5. Secure assets such as financial accounts, personal property, possessions, and real estate	*First week*	☐
6. Order death certificates	*First week*	☐
7. Determine and notify heirs listed in will	*First month*	☐
8. Schedule reading of will	*First month*	☐
9. File a copy of the will with probate court	*First month*	☐
10. Start probate process (if needed)	*First month*	☐
11. Notify Social Security and Veterans Affairs (if needed)	*First month*	☐
12. Forward mail	*First month*	☐
13. Open an estate bank account	*First month*	☐
14. Inventory estate assets	*First 3 months*	☐
15. Inventory and resolve estate debts	*First 3 months*	☐
16. Determine estate solvency	*First 3 months*	☐

Task*	Timeline*	Complete
17. Publish notice of death	*First 3 months*	☐
18. Cancel subscriptions and unused services	*First 3 months*	☐
19. Notify life and medical insurance companies	*First 3 months*	☐
20. Notify banks and credit card companies	*First 3 months*	☐
21. Notify companies of investment accounts such as IRAs, 401(k)s, pension plans, annuities, or other investments with beneficiaries	*First 3 months*	☐
22. Notify agencies such as Department of Motor Vehicles	*First 3 months*	☐
23. Determine how to handle the loved one's online and social media accounts	*First 3 months*	☐
24. File IRS Form 56 (notifying IRS that executor will be filing taxes for the deceased & the estate)	*First 3 months*	☐
25. Pay local property taxes	*Calendar year*	☐
26. Provide Schedule K-1 to any trust beneficiaries	*Tax notice year*	☐
27. Submit final income tax forms (1040) for your loved one	*Tax year*	☐
28. Submit estate income tax forms (1041)	*Tax year*	☐
29. Conduct estate sale (if needed)	*As possible*	☐
30. Distribute all assets and obtain a signed receipt of distribution from each heir	*As possible*	☐
31. Compensate executor of the estate (refer to state limits)	*As possible*	☐
32. Submit probate final accounting and closing statements	*As possible*	☐
33. Close estate bank account	*As possible*	☐

Other items to remember: ______________________________

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