



THE HEAVY HITTERS PROJECT
One Family, One Fight

IN CASE OF DEATH

A Planning Binder for Veterans and Their Families

This binder holds the documents, account information, and instructions your family will need. Fill it in while you can. Keep it somewhere they know to look.

Veteran Name:

Branch of Service:

Date Binder Prepared:

Binder Location (tell your family):

heavyhittersproject.org

CONTENTS

Section 1 — Immediate Action Checklist

Section 2 — Military & VA Documents

Section 3 — Legal Documents

Section 4 — Financial Accounts

Section 5 — Benefits & Survivor Support

Section 6 — Key Contacts

Section 7 — Personal Wishes

Section 8 — Family Support Resources

How to use this binder: work through it a section at a time. It's fine to leave things blank for now and come back. Anything you don't finish is still more than your family had before.

QUICK REFERENCE

Phone Numbers Your Family Will Need

Keep this page nearby. These are the numbers most families need in the first days and weeks.

Department of Veterans Affairs

WHO TO CALL	PHONE NUMBER	WHEN / NOTES
VA Benefits & Claims (general info)	800-827-1000	Report a death, ask about burial allowance, DIC, pension
MyVA411 (main VA info line)	800-698-2411	General questions, any VA topic
National Cemetery Scheduling Office	800-535-1117	Schedule burial at a VA national cemetery
VA Life Insurance (SGLI / VGLI)	800-419-1473	Life insurance claims
VA Health Benefits	877-222-8387	Cancel or transfer VA health enrollment
Veterans / Military Crisis Line	988 , press 1	24/7, or text 838255

Social Security Administration

WHO TO CALL	PHONE NUMBER	WHEN / NOTES
Social Security Administration	800-772-1213	Report death, ask about survivor benefits
Social Security (TTY)	800-325-0778	For hearing impaired

Military Pay & Insurance

WHO TO CALL	PHONE NUMBER	WHEN / NOTES
DFAS (retired pay, SBP annuities)	800-321-1080	Survivor Benefit Plan, retired pay
TRICARE	800-538-9552	Health coverage questions for survivors

Grief & Family Support

WHO TO CALL	PHONE NUMBER	WHEN / NOTES
TAPS (Tragedy Assistance Program)	800-959-8277	24/7 grief support for military/veteran families
Military OneSource	800-342-9647	24/7 counseling and referrals
Vet Center Call Center	877-927-8387	24/7 bereavement counseling line
The Heavy Hitters Project	406-781-4924	Logistics support, any time

SECTION 1**Immediate Action Checklist**

This page is for the first 24 to 72 hours. It is meant to be read by whoever finds this binder first, even if they are not familiar with the rest of it.

Do This First

DONE	TASK	DATE / NOTES
☐	Call funeral home or coroner if death occurred outside a hospital or hospice	
☐	Notify immediate family members	
☐	Locate this binder and the veteran's DD-214	
☐	Contact the funeral home to begin arrangements	
☐	Request military funeral honors (see Section 2)	
☐	Notify employer (veteran's, and your own if leave is needed)	
☐	Order 15-20 certified copies of the death certificate from the funeral home	

Do NOT Do Yet

These feel urgent but are not. Doing them too fast can create problems.

DONE	TASK	DATE / NOTES
☐	Do not cancel health insurance until you confirm survivor coverage options	
☐	Do not close joint bank accounts before speaking with a VSO or attorney	
☐	Do not cash or deposit any checks made out to the deceased	
☐	Do not cancel the phone line if it is tied to two-factor authentication on important accounts	

Within the First Two Weeks

DONE	TASK	DATE / NOTES
☐	Report the death to the VA (call 1-800-827-1000)	
☐	Report the death to Social Security (funeral homes often do this automatically, confirm it happened)	
☐	Contact SGLI/VGLI or other life insurance to begin a claim	
☐	Contact a Veteran Service Officer (VSO) for help filing survivor benefit claims	
☐	Contact The Heavy Hitters Project if you need logistics support (see Section 8)	

SECTION 2**Military & VA Documents**

The DD-214 is the single most requested document after a veteran's death. Confirm its location below and keep at least one certified copy in this binder.

Service Record

DD-214 Location:

Branch of Service:

Years of Service:

Rank at Discharge:

Discharge Type:

Service Medical Records Location:

VA Claim Information

VA Claim Number:

VA File Number:

Service-Connected Disability Rating:

Assigned VSO / Accredited
Representative:

VSO Phone Number:

Burial Benefits

Eligible veterans may qualify for a VA burial allowance, plot or interment allowance, a government headstone or marker, a burial flag, and a Presidential Memorial Certificate. Ask your funeral home or VSO to confirm eligibility and file VA Form 21P-530a.

Eligible for Arlington or a VA National Cemetery?
(Y/N):

Preferred Cemetery:

Plot Already Purchased? (Y/N, Location):

National Cemetery Administration

The National Cemetery Scheduling Office arranges burial at any open VA national cemetery. You or the funeral director can call directly to schedule, even without a pre-need decision letter. Have the veteran's DD-214 ready when you call.

National Cemetery Scheduling Office:

800-535-1117 (TTY: 711), Monday to Friday 8:00 a.m. to 7:30 p.m. ET, Saturday 9:00 a.m. to 5:30 p.m. ET.

Military Funeral Honors

Funeral honors (a minimum two-person detail, flag folding and presentation, and Taps) are provided free of charge to eligible veterans. Ask the funeral home to submit the request, or contact the veteran's branch of service liaison directly.

Funeral Honors Requested Through:

Contact Name / Phone:

Additional Flags Needed (see supplemental flag program):

Requesting the Burial Flag — What You Need

A U.S. burial flag is provided at no cost to drape the casket or accompany the urn of an eligible veteran. Bring both of these documents when you request it, whether through the funeral home, a VA regional office, or a post office that issues burial flags.

DONE	TASK	DATE / NOTES
☐	Veteran's DD-214 (or other discharge document showing character of service)	
☐	Certified copy of the death certificate	
☐	VA Form 27-2008 (Application for United States Flag for Burial Purposes) — funeral home can usually provide and submit this	

SECTION 3**Legal Documents**

A note on Power of Attorney: a POA becomes void the moment the person dies. If you have been managing the veteran's affairs under a POA, that authority ends at death and the executor named in the will (or the court-appointed administrator) takes over.

Will & Estate**Will Location:****Executor Name:****Executor Phone:****Attorney Who Drafted Will:****Attorney Phone:****Other Legal Documents****Power of Attorney Location (note: void at death):****Advance Directive / Living Will Location:****Guardianship Papers Location (if applicable):****Marriage Certificate Location:****Divorce Decree Location (if applicable):**

SECTION 4**Financial Accounts**

List every account your family will need to find. Do not write full account numbers or passwords in this binder; note where that information is securely stored instead (password manager, safe, attorney's office).

Banking

DONE	TASK	DATE / NOTES
☐	Checking / Savings — Bank Name: _____ Branch/Contact: _____	
☐	Checking / Savings — Bank Name: _____ Branch/Contact: _____	
☐	Safe Deposit Box — Location & Key Location: _____	

Retirement & Pension

TSP (Thrift Savings Plan) Account Info Location: _____

Military Retirement / Pension Provider: _____

401(k) / IRA Provider(s): _____

Survivor Benefit Plan (SBP) Enrolled? (Y/N): _____

Insurance

SGLI / VGLI Policy Number: _____

SGLI / VGLI Beneficiary: _____

Other Life Insurance Provider(s): _____

Homeowners / Auto Insurance Provider: _____

Debts & Recurring Bills

DONE	TASK	DATE / NOTES
☐	Mortgage / Landlord: _____	
☐	Auto Loan: _____	
☐	Credit Cards: _____	
☐	Utilities (electric, water, gas): _____	
☐	Phone / Internet: _____	
☐	Subscriptions to cancel: _____	

SECTION 5**Benefits & Survivor Support**

Social Security

Surviving spouses and dependent children may be eligible for Social Security survivor benefits. A one-time death payment may also apply. Call 1-800-772-1213 or visit your local office.

DIC — Dependency and Indemnity Compensation

If the veteran's death was connected to a service-related condition, surviving spouses, children, or dependent parents may be eligible for DIC through the VA. A VSO can help determine eligibility and file VA Form 21P-534EZ.

DIC Eligibility Confirmed by VSO? (Y/N):

Date DIC Claim Filed:

Survivor Benefit Plan (SBP)

If the veteran was retired military and enrolled in SBP, the surviving spouse or beneficiary should contact DFAS to begin the annuity.

DFAS Contact Info:

State Veteran Benefits

State:

Property Tax Exemption Filed? (Y/N):

State VA Office Contact:

SECTION 6

Key Contacts

Funeral Home

Attorney

Accountant / Tax Preparer

Financial Advisor

VSO (Veteran Service Officer)

Employer / HR (Veteran's)

Employer / HR (Yours)

Clergy / Spiritual Support

Primary Care Physician

Insurance Agent

Closest Family Member

Closest Friend

SECTION 7

Personal Wishes

Funeral & Burial Preferences

Obituary — Key Facts to Include

Full name, dates and places of birth, family members, military service summary, career, hobbies, and organizations to mention.

Digital Accounts

Do not write passwords here. Note where they are stored (password manager name, safe, etc.) so your family can access them.

DONE	TASK	DATE / NOTES
☐	Email Account(s) — Access stored at: _____	
☐	Social Media Accounts — Access stored at: _____	
☐	Password Manager — Name & Access: _____	

SECTION 8

Family Support Resources

You do not have to carry this alone. These organizations exist specifically to help veteran families through this process.

The Heavy Hitters Project

One Family, One Fight. Heavy Hitters can provide direct logistics support during this process, help coordinate with the VSO and funeral home, and connect your family to additional resources.

Contact:

Phone: 406-781-4924 | heavyhittersproject.org

TAPS — Tragedy Assistance Program for Survivors

National grief support organization specifically for military and veteran families. 24/7 support line: 1-800-959-8277.

Vet Center Bereavement Counseling

Free bereavement and grief counseling for family members through your local VA Vet Center. Eligibility varies, so call to ask about your family's situation. Call 1-877-927-8387, 24/7.

Military OneSource

Confidential, no-cost counseling and referrals for eligible family members, including help navigating grief, finances, and the paperwork that follows a death. Call 1-800-342-9647, 24/7.

Local American Legion / VFW Post

Your local post can often help directly with funeral honors coordination, benefits claims, and connecting your family to other veterans and families who have been through this.

Local Post Contact:

Other Resources
