

2008 Chapter Presidents' Symposium

Personal Affairs Workshop

Benefits Information Staff

Objective

- **Use Chapter Members Wisdom & Experience**
 - To identify & shape Personnel Affairs Committee role
- **Report Out**
 - Chapter President's Symposium Saturday morning
 - No more than 3 PowerPoint slides

Agenda

- **Morning Session:**
 - **Overview**
 - **Break into 2 teams**
 - **Planning Before Crisis**
 - **Response During Crisis & Long Term**
 - **Brainstorm**
 - **Challenges faced navigating military system**
 - **Building your Chapter Personnel Affairs tool kit: Skills, relationships, references, materials**

- **Lunch**

- **Prioritize recommendations**
- **Prepare 10 minute brief (no more than three slides)**
- **Saturday Morning**
 - **Report out – two volunteers one from each group**

Initial Assessment

- **What are the spouse/family's immediate needs?**
- **How well is the spouse/family prepared to cope?**
- **What family resources are available?**
- **What community resources are available?**
- **What military resources are needed/available?**
- **What Chapter support can be provided?**

PA Committee Considerations

Questions for the PA Committee:

- How can we prepare?
 - What do we need to know?
 - What resources do we need?
- What are the family's immediate needs before, during & after the crisis?
- What are the greatest challenges faced by survivor/families?
- Are needs military related or other issues?
- Is there a follow-up plan?
- What are the long term needs?

The Personal Affairs Team

- **Consider diverse team members**
 - **Include a surviving spouse**
 - **Include a military survivor**
- **Consider local issues that can have significant impact on survivors**
- **Consider community networks**
- **Consider following for at least one year**

Two Teams

- Planning – Team A – (Bud)
 - Remain in Tallac Room
- Response – Team B – (Katherine) –
 - Move across hall to Zephyr Room

Tool Kit - Checklist

- **Government - Federal**
 - Social Security
 - VA
 - OPM
- **Government – State and Local**
 - Agency of Aging
 - Mental Health Professionals
 - VA

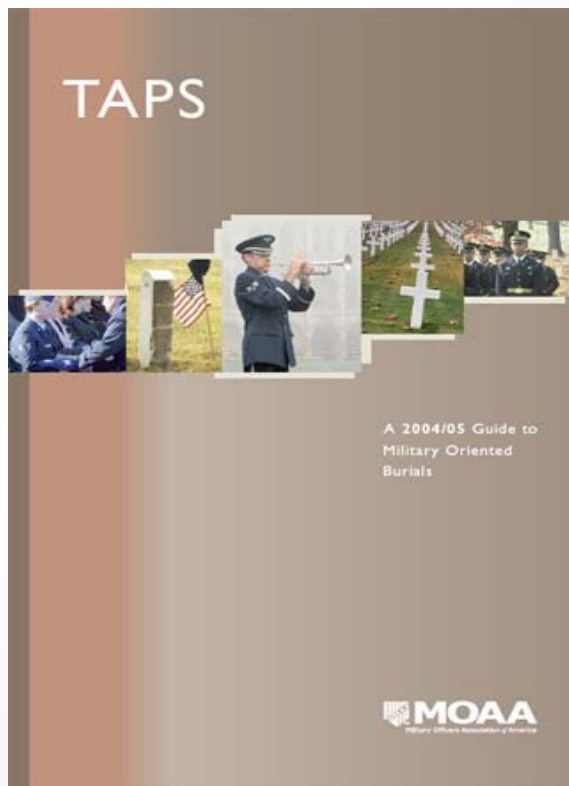
Tool Kit - Checklist

- **Military**
 - **Bases**
 - **RAO/RSO**
 - **Casualty Offices/Chaplains**
 - **JAG Office**
 - **MTF or MCSC**
 - **Pay / Personnel Centers**

Tool Kit - Checklist

- **MOAA**
 - **Benefits Information**
 - **Chapters**
- **Banks**
- **Clergy**
- **Funeral Directors**
- **Grief counselors**
- **Lawyer/trust administrator/
executor/financial advisor**

TAPS



- **Cemeteries**
 - VA National Cemetery
 - VA State Cemetery
 - Arlington
 - Overseas
- **Burial**
 - At Sea
 - Burial Honors
 - Internment

Funeral Honors

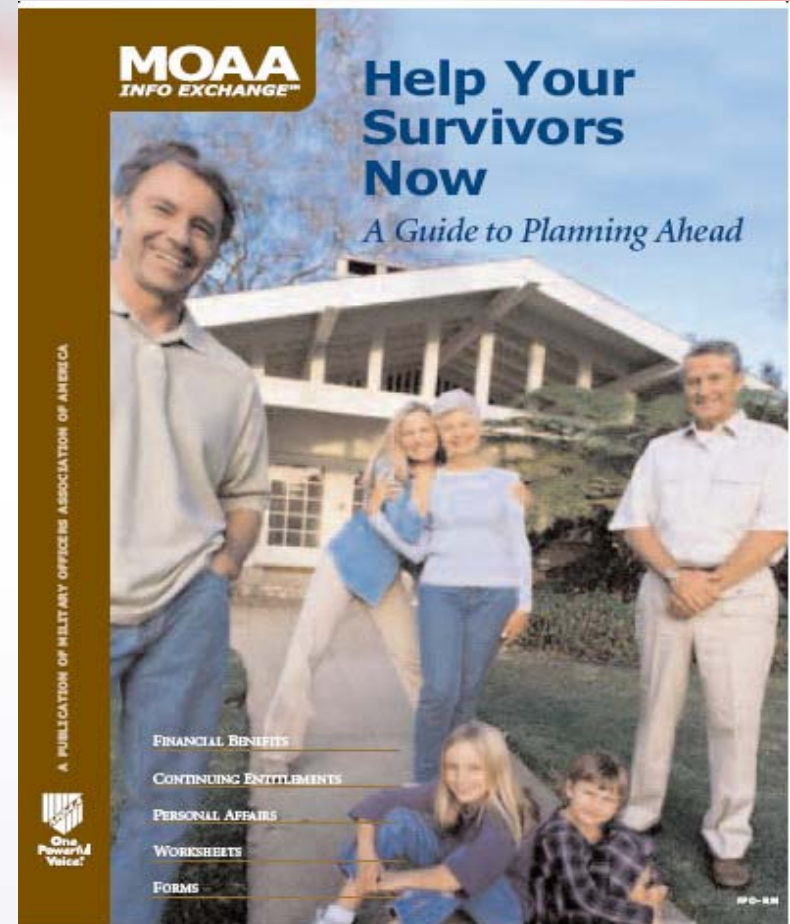
- **Military Funeral Honors**
 - **FY 2000 National Def Auth. Act**
 - **Next of kin must request the honors**
 - **Funeral director must contact DoD:**
1-877-MIL-HONR (645-4667)
www.militaryfuneralhonors.osd.mil

Funeral Honors

- **Minimum Honors Provided**
 - **Two uniformed Armed Forces members**
 - **One from the service of the deceased**
 - **Fold & present American Flag**
 - **Ceremonial Bugle**
 - *Or Recording of Taps* if bugler is unavailable

Help Your Survivors...Now!

- Potential Financial Benefits
- Entitlements
- Personal Affairs
- Personal Affairs Workbook
- Checklist



Personal Affairs

- **Gather Information Today**
- **Get the Facts:**
 - *Use creditable sources*
- **Review Annually**

Personal Affairs

- **Get Personal Affairs in order**
 - **Update your Will, Trust, Living Will**
 - **Gather Documentation**
 - **Complete Personal Affairs Workbook**

Gotta Will, Trust, Living Will? Get A Good Lawyer!



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Documentation Readily Available

- Birth Certificates
- Marriage Certificates
- Divorce Decree
- Changes in name
- Death Certificate
- Separation Documents
 - DD Form 214
 - Retirement Orders

Living Expenses

- **Money set aside**
 - **For surviving spouse**
 - **60-90 days**
 - **Immediate living expenses after sponsor's death**

Review Personal Affairs Annually

*“Even if you are on the right track,
you’ll get run over if you just sit
there.”*

Will Rogers

Agenda

- **Afternoon Session:**
 - **Afternoon Overview**
 - **Best Practices**
 - **Team Reports & Discussions**
 - **Before Crisis**
 - **Crisis & Long Term**
 - **Disaster Preparedness**
 - **Preparedness**
 - **Crisis Mode**
 - **Recovery**
 - **Create Symposium report slides**

Disaster Preparedness

- **Prepare**
 - **Resources**
- **Crisis Mode**
 - **Plan**
- **Recovery**
 - **Self**
 - **Others**

Family Disaster Plan

- Find out what could happen to you
- Create a Family Disaster Plan
- Complete your checklists
- Practice and maintain your plan

What Could Happen to You?

- Natural, Human-caused or technological
- Warning systems?
- Elderly or disabled persons?
- Pets?
- School and workplace plans?

Create a Plan

- **Set up meeting places**
- **Emergency communications**
- **Family contact**
- **Mandatory evacuations**
- **Escape routes**
- **Pets**

Complete Your Checklists

- **Post**
- **Teach family members**
- **Insurance coverage**
- **Disaster supply kit**
 - **Home**
 - **Cars**
- **First Aid training**

Practice Your Plan

- **Conduct Drills**
- **Replace stored food and water**
- **Check smoke alarms/replace batteries regularly (change your clocks/change your batteries**
- **Check equipment (extinguishers, pumps, etc.)**

Suggested Framework

- **Slide 1**
 - **Pre-need preparation work**

- **Slide 2**
 - **Need support & follow-up**

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