

# Surviving Spouse Liaison Training

May 3, 2025  
Oklahoma City, OK



# Presenter(s)



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MOAA BOD Surviving Spouse Rep



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Surviving Spouse Advisory Council

# What is a Surviving Spouse Liaison?

- Primary POC for surviving spouse and spouse legislative & benefits issues
- Advise the Council/Chapter president on surviving spouse issues
- **Encourage, Engage & Educate** surviving spouses and member spouses to take an active role in the chapter/council and MOAA advocacy
- Assist members during times of loss



# Who can be a Surviving Spouse Liaison?

- Any member or spouse – male or female – can be appointed to the position
- Does not have to be a surviving spouse



# What does a Surviving Spouse Liaison do?

- Promote key missions of MOAA:
  - Advocacy
  - Membership
  - Council & Chapter Support
  - Engagement/Resources
  - Philanthropy – MOAA Foundation and Scholarship Fund

# Why should ALL Councils/Chapters have a Surviving Spouse Liaison?

- Provides a subject matter expert to assist with survivor issues
- Expands membership opportunities and welcomes other surviving spouses
- Points toward Levels of Excellence awards for appointing a Surviving Spouse Liaison (name and email address in database required)

# Advocacy Support

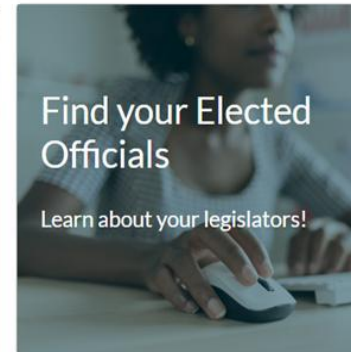
- Contact lawmakers using MOAA's Legislative Action Center
- Encourage others to sign up



[Action Center Tutorial](#)

[Return to MOAA.org](#)

Hello, Jennifer! ▾



As the new Congress convenes, legislation must be reintroduced, reviewed, and reassessed. MOAA is actively tracking key issues, and new calls-to-action will be available soon—stay engaged and up-to-date by checking out [www.moaa.org](http://www.moaa.org).



# 119<sup>th</sup> Congress: MOAA Advocacy Priorities

## Military Spouse Hiring Act



Military spouses face a staggering 21% unemployment rate — five times the national average. It's time to approach this persistent unemployment issue by incentivizing businesses to hire military spouses by tapping into an existing tax credit program.

**MOAA urges Congress to add military spouses as a target group under the Work Opportunity Tax Credit.**

## Unaccompanied Housing Improvements



Thousands of servicemembers live in substandard barracks plagued by mold, pests, sewage overflows, and broken safety systems. Despite legislative action, a \$137 billion backlog in deferred maintenance leaves servicemembers facing unsafe conditions.

**MOAA urges Congress to require DoD to provide transparency on barracks funding, and to empower lawmakers to identify and address these challenges in their districts and states.**

## Improve Military Health System Access to Care



Timely access to quality care has been a longstanding problem in the military health system (MHS). Servicemembers and TRICARE beneficiaries need a digital platform to report access to care issues and receive help navigating the MHS. Such a platform would also provide greater visibility and ensure fixable access challenges are addressed.

**MOAA urges Congress to pass legislation establishing an MHS digital access assistance platform.**



# 119<sup>th</sup> Congress: MOAA Advocacy Priorities

## Ending the Wait Report Priorities



Veterans exposed to toxins during service face decades-long delays for acknowledgment and care. The current system leaves veterans and their families waiting far too long for the benefits and support they need and have earned.

**MOAA urges Congress to enact legislation to bolster the legal framework for creating presumptive conditions.**

## Caregiver Support Improvements



Veteran caregivers provide essential care for aging and disabled veterans, often at the expense of their own financial security, mental health, and career aspirations. These caregivers deserve tangible resources to support their vital role within veterans' families and communities.

**MOAA urges Congress to pass the Veteran Caregiver Reeducation, Reemployment, and Retirement Act.**

# Membership Support

- Grow surviving spouse membership
- 46k surviving spouse members
- Life member benefit
- Encourage membership or upgrades to support SSAC goals



# Growing Membership

- Initiate post death contact – invite to chapter meetings
- Make phone calls; offer rides
- Welcome & include in ALL chapter activities
- Share info about MOAA benefits
- Request Feedback
- \*Credit SSAC\*



# Council & Chapter Support

- **Encourage** participation within the chapter
- **Apply** for chapter/council board
- **Solicit** input to design programs of interest
- **Volunteer** for leadership positions
- **Incorporate** surviving spouses in all aspects of chapter management
- **Take charge!** Design, develop, direct a special project

# Chapter & Council Support

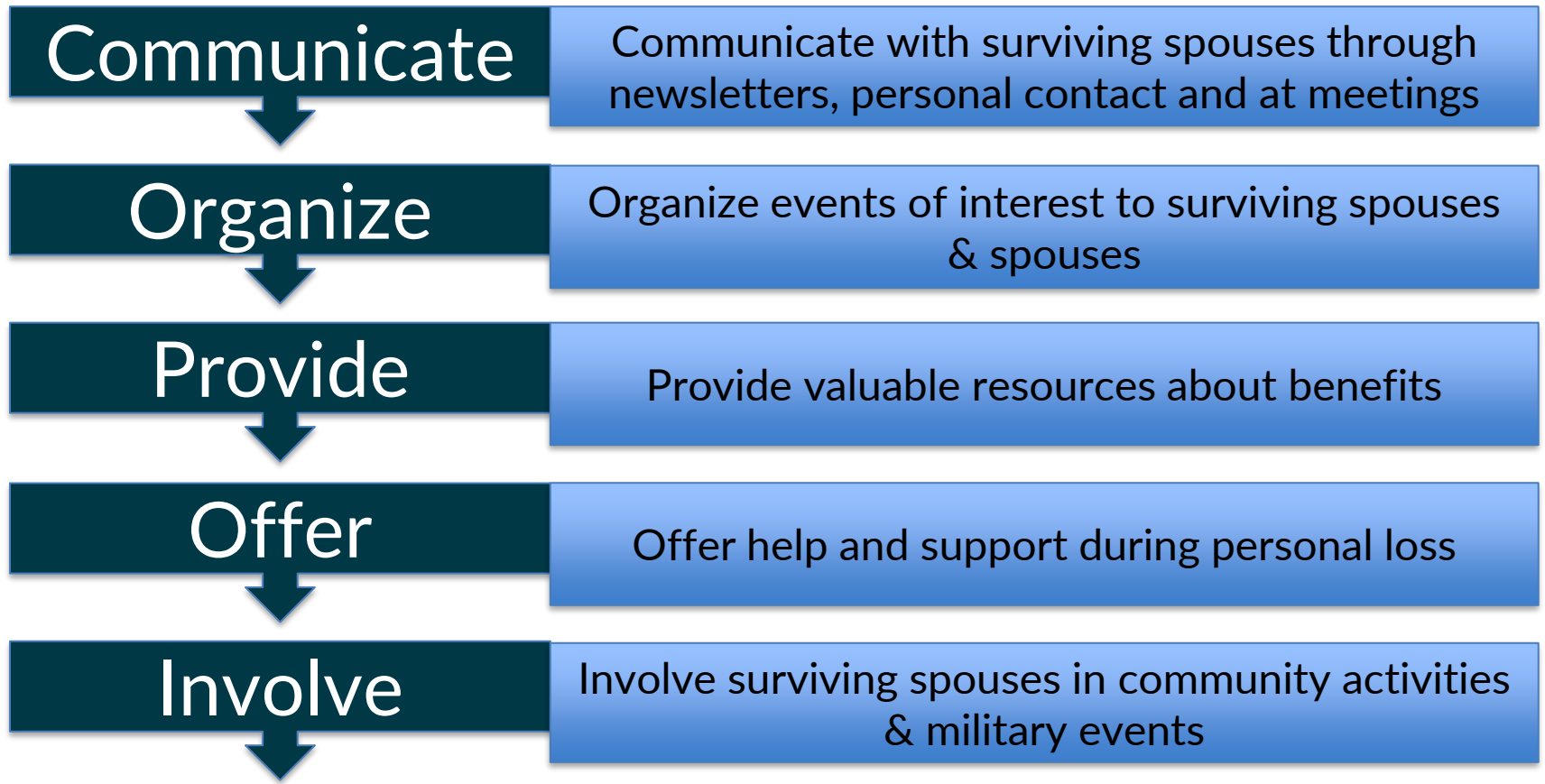
- Educate about planning for and handling a personal loss and/or emergency
- Recognize outstanding performance at the Council/Chapter level



- Support Council/Chapter events in your local community



# Best Practices





# Educate: Planning Ahead!



- Encourage members & spouses to talk to each other about death and ways to prepare
- Be prepared **BEFORE** your spouse becomes a surviving spouse

Have a  
Heart-  
to-  
Heart!



# Steps to Prepare



- Make an appointment with your spouse/child/trusted friend
- Put it on the calendar
- Assemble paperwork:
  - Birth/marriage certificates, divorce decrees & property distributions
  - 2<sup>nd</sup>/3<sup>rd</sup> marriages
  - Insurance policies
  - Mortgage & brokerage reports
  - Credit card statements
  - Utility bills

# Steps to Prepare (cont.)

- Passwords & user IDs
- Bank statements
- Trust and Wills
- Safety Deposit Box
- Minimum Required Withdrawals
- Subscriptions
- Form DD 214 / Form DD 1300



# Form DD 214 vs Form DD 1300

# DD 214: Release or Discharge From Active Duty

# DD 1300: Report of Casualty- Active-Duty Death

CAUTION: NOT TO BE USED FOR  
IDENTIFICATION PURPOSES

THIS IS AN IMPORTANT RECORD.  
SAFEGUARD IT.

ANY ALTERATIONS IN SHADED  
AREAS RENDER FORM VOID

# CERTIFICATE OF RELEASE OR DISCHARGE FROM ACTIVE DUTY

1. NAME (Last, First, Middle)

4.a. GRADE, RATE OR RANK

4.b. PAY GRADE

2. DEPARTMENT, COMPONENT AND BRANCH

3. SOCIAL SECURITY NO.

7.a. PLACE OF ENTRY INTO ACTIVE DUTY

5. DATE OF BIRTH (YYMMDD)

6. RESERVE OBLIG. TERM, DATE  
Year Month Day

8.a. LAST DUTY ASSIGNMENT AND MAJOR COMMAND

7.b. HOME OF RECORD AT TIME OF ENTRY (City and state, or complete address if known)

9. COMMAND TO WHICH TRANSFERRED

8.b. STATION WHERE SEPARATED

11. PRIMARY SPECIALTY (List number, title and years and months in specialty. List additional specialty numbers and titles involving periods of one or more years.)

12. RECORD OF SERVICE

10. SGLI COVERAGE  
Amount: \$

☐ None

a. Date Entered AD This Period

Year(s)

Month(s)

Day(s)

b. Separation Date This Period

c. Net Active Service This Period

d. Total Prior Active Service

e. Total Prior Inactive Service

f. Foreign Service

g. Sea Service

h. Effective Date of Pay Grade

13. DECORATIONS, MEDALS, BADGES, CITATIONS AND CAMPAIGN RIBBONS AWARDED OR AUTHORIZED (All periods of service)

14. MILITARY EDUCATION (Course title, number of weeks, and months)

<b>REPORT OF CASUALTY</b> (SEE INSTRUCTIONS) (SEE INSTRUCTIONS)		DEPARTMENT OF THE ARMY U.S. ARMY HUMAN RESOURCES COMMAND (SEE INSTRUCTIONS)		REPORT CONTROL SYMBOL (SEE INSTRUCTIONS)	
1. NAME (Last, First, Middle Initial) 2. GRADE 3. SERVICE NUMBER 4. DATE OF BIRTH 5. SEX 6. RACE 7. RELIGION 8. MARITAL STATUS 9. SOCIAL SECURITY NUMBER 10. ADDRESS 11. CITY 12. STATE 13. ZIP CODE 14. PHONE NUMBER 15. E-MAIL ADDRESS 16. HOME ADDRESS 17. CITY 18. STATE 19. ZIP CODE 20. PHONE NUMBER 21. E-MAIL ADDRESS 22. HOME ADDRESS 23. CITY 24. STATE 25. ZIP CODE 26. PHONE NUMBER 27. E-MAIL ADDRESS 28. HOME ADDRESS 29. CITY 30. STATE 31. ZIP CODE 32. PHONE NUMBER 33. E-MAIL ADDRESS 34. HOME ADDRESS 35. CITY 36. STATE 37. ZIP CODE 38. PHONE NUMBER 39. E-MAIL ADDRESS 40. HOME ADDRESS 41. CITY 42. STATE 43. ZIP CODE 44. PHONE NUMBER 45. E-MAIL ADDRESS 46. HOME ADDRESS 47. CITY 48. STATE 49. ZIP CODE 50. PHONE NUMBER 51. E-MAIL ADDRESS 52. HOME ADDRESS 53. CITY 54. STATE 55. ZIP CODE 56. PHONE NUMBER 57. E-MAIL ADDRESS 58. HOME ADDRESS 59. CITY 60. STATE 61. ZIP CODE 62. PHONE NUMBER 63. E-MAIL ADDRESS 64. HOME ADDRESS 65. CITY 66. STATE 67. ZIP CODE 68. PHONE NUMBER 69. 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# Things to Consider

- Make Personal Decisions
  - Burial Preferences
  - Disposal of Assets
  - Beneficiary Information
  - Durable Power of Attorney
  - Health Care Decisions
- Ensure utilities are in BOTH names
- Check state regulations for car registration



# Income & Expense Exercise

- Joint:
  - Include all income & expenses for both you and your spouse
- Spouse 1\*
  - Include only your income & expenses
- Spouse 2\*
  - Include only spouse's income & expenses

*\*In Spouse 1 & 2 scenarios, include income that would be available to the other in case of death, i.e. insurance benefits or SBP. Also include any expenses that would apply to each, such as golf fees, season tickets to theater/sports, nail/hair expenses, club memberships, etc.*

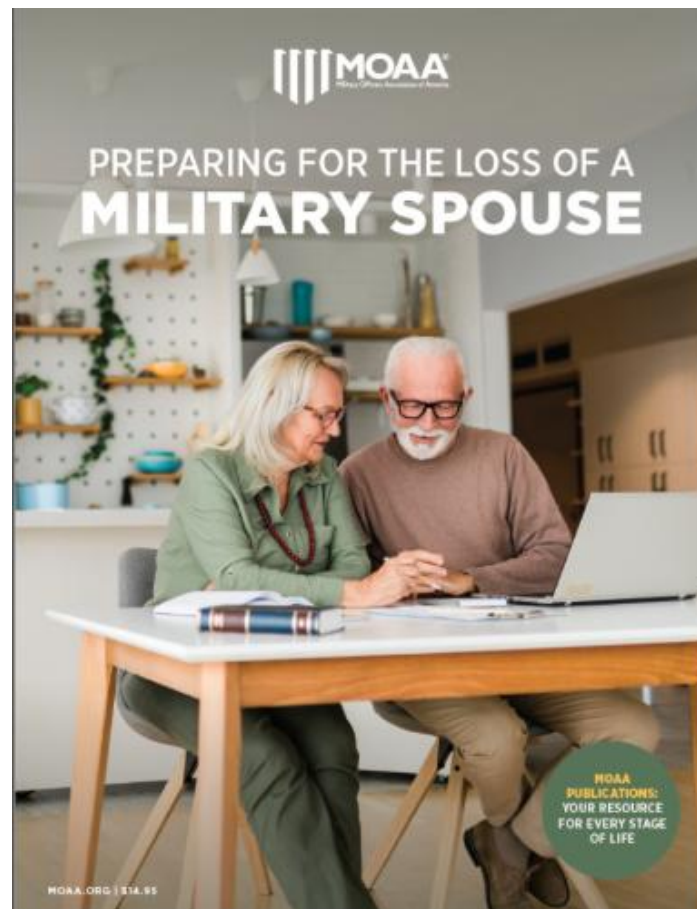
# Reminder: New ID Cards

- Old ID cards will no longer be valid as of **December 31, 2025**
- Applies to all IDs even those with an “indefinite expiration date”
- Schedule an appointment today: [ID Card Office Online](#)



# MOAA Publications

- [Preparing for the Loss of a Military Spouse](#)
  - A handbook for one of life's toughest assignments
- [MOAA's Survivor's Checklist](#)
- Free for Life & Premium members



# Engage & Stay Connected

## Ways to Stay Informed:

- [SSAC articles](#) on the MOAA website
- MOAA [publications](#)/brochures
- [MOAA Regional Leadership Training Workshops](#)
- [MOAA Webinars](#)
- [MOAA Advocacy Update](#)
- [MOAA Surviving Spouse & Friends Facebook Group](#)

**Join MOAA's Surviving Spouse Virtual Chapter**



# VA Benefits & Support

- Visit these important websites:
  - [www.VA.gov](http://www.VA.gov)
  - [VA Office of Survivors Assistance](#)
  - [Joint Survivors' Forum](#)



# VA Office of Survivor Assistance

- Established in 2008 “to serve as a resource regarding all benefits and services furnished by the Department [VA] to survivors and dependents of deceased veterans and members of the Armed Forces.”
- Contact: [officeofsurvivors@va.gov](mailto:officeofsurvivors@va.gov)
- Ann Duff, Director, Office of Survivor Assistance: (202) 461-9383; [ann.duff@va.gov](mailto:ann.duff@va.gov)

“No wrong door!”





# Related Content: Caregivers

- A **caregiver** is an individual, often a family member, who provides personal care services to a veteran who needs assistance with activities of daily living or requires supervision due to a disability or illness.
- Primary caregivers must be at least 18 years of age.
- Caregivers do not need to be a relative or live with the veteran.
- Some caregivers may be eligible to receive financial assistance from the VA.

# Resources for Caregivers

- [VA Caregiver Support Program](#); (855) 260-3274
- [VA Resources for Caregivers](#)
- [Veterans Health Administration](#)
  - [VA Patient Advocate](#)
- [Tips for Lifelong Caregiving](#) (MOAA/EDF)
- [Elizabeth Dole Foundation](#)

# Important Websites/Phone Numbers

- [Defense Finance Accounting Service \(DFAS\); \(888\)332-7411](#)
- [AARP](#)
- [The Military Coalition](#)
- [Military OneSource; \(800\) 342-9647](#)
- [Tragedy Assistance Program for Survivors \(TAPS\); \(800\) 959-TAPS \(8277\)](#)
- [Gold Star Wives of America; \(888\) 751-6350](#)
- [USAA Survivor Relations Team; \(800\) 292-8294](#)
- [“The Day-After Calls”](#)
- [MOAA Virtual Surviving Spouse Chapter](#)

# MOAA Charities

## The MOAA Scholarship Fund

## The MOAA Foundation (TMF)



### Platinum

Both MOAA Charities are Platinum rated by Guidestar!



**100+**

individuals & families in crisis have received financial assistance through The MOAA Foundation's Crisis Relief program



**17,000+**

students have received assistance from the MOAA Scholarship Fund



# Engagement: MOAA Publications



- [Financial Planning Guide](#)
- [Estate Planning](#)
- [Personal Affairs Guide: A Personal Inventory for Peace of Mind](#)
- [Benefits Planning Guide](#)
- [Transitioning into Medicare and TRICARE for Life](#)
- [Preparing for the Loss of a Military Spouse](#)
- [Your Guide to Military Burials](#)
- And more...

# SSVC Points of Contact

- **Surviving Spouse Virtual Chapter (SSVC)**
  - Pat Green, President
  - Gail Joyce, Vice President
  - Nora Durham, 2<sup>nd</sup> Vice President
  - Roy Yenchesky, Membership
  - Susan Collins, Secretary
  - Vivianne Wersel, Newsletter Editor
  - Cheryl Toland, Treasurer
  - Micki Costello, Webmaster
- **MOAA Staff:**
  - Jennifer Goodale, Director, Military Family & Survivor Policy, Government Relations: [jenniferg@moaa.org](mailto:jenniferg@moaa.org); (703) 838-8141



# Surviving Spouse Virtual Chapter



- Connects surviving spouses throughout the US and across the world
- Provides opportunities to Encourage, Engage & Educate
- No dues
- Monthly virtual meetings (3<sup>rd</sup> Tuesday of each month)
- [mssvc02@gmail.com](mailto:mssvc02@gmail.com)

# Surviving Spouse Advisory Council

- Gail Joyce, Chair, Texas
- Pat Green, Florida
- Vivianne Wersel, North Carolina
- Nora Durham, Arizona
- Kathy Thorp, Maryland
- Roy Yenchsky, Kansas
- Susan Collins, Pennsylvania
- Cheryl Toland, Washington





# Never Stop Serving!



