

# Military Deployment Checklist

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Preparing & Gathering  
Important Documents For  
Military Deployment

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A guide by  safelyfiled

First, we want to say **THANK YOU** for your service to our country. We appreciate your sacrifice very much.

Secondly, we know that your service may require much time away from home and your family needs to keep things running on the home front while you're away. You also may need access to documents and family records while deployed. So, with this thought in mind, we have created a checklist for you of the types of documents you may want to upload and store in SafelyFiled. You can then grant access to family members and/or any professional or military agencies that take action on your behalf.

Also, we wanted to provide you with a checklist of some things you may need to take care of specifically as a military person being deployed. Be sure to take advantage of the other SafelyFiled checklists that address other aspects of you life such as important family documents and estate planning.

Print this list out or fill it in online. Then, after completing an item or uploading the document into SafelyFiled, check the item off the list and then upload this checklist back into SafelyFiled so your co-member or trusted associate knows what you have completed and have uploaded to your SafelyFiled account. Be sure to give access to your participants so they can get to this info while you're away. You can also set up reminders for yourself and your participants if some things need to be acted upon while you're away.

# Checklists

## Personal Documents

These identify you and your family members. Keeping copies of them and recording the location of the originals in SafelyFiled may reduce hunting through the filing cabinet later. If the original item gets lost, having a digital copy of the information will make it much easier to get new ones.

- Birth Certificates
- Social Security Cards
- Driver's Licenses
- State Issued ID cards
- Military ID Card
- Passports
- Death Certificates
- Religion-related certificates (baptisms, etc.)
- Military Award Certificates
- Certificate of Naturalization
- Certificate of Citizenship / Green card
- Marriage Certificate
- Divorce Decrees
- Child Custody Decrees and Agreements
- Copy of Deployment/TDY Orders

# Family Financial

Be sure your family members at home don't have to be concerned about their financial well-being

- Organize and create a payment plan know all payments that need to be made and on what date.
- Record address of your bank(s)
- Record bank account numbers and types of accounts.
- Do you have a safety deposit box? Where is the key?
- Know the location of all your credit cards; keep their numbers and the company's contact information in a separate, safe location
- Tell creditors about the deployment- they may reduce interest rates.
- Decide how to pay taxes if member will be deployed during tax time. The IRS requires a power of attorney, obtained only from them, which allows you to file your spouse's taxes; visit [www.irs.gov](http://www.irs.gov).
- Keep copies of all your state and federal tax returns.
- Record where your original insurance documents are located. (You can use the location field in SafelyFiled for this)
- Go over home insurance papers and decide if coverage is sufficient. Some homeowners insurance offers an additional option, that costs more, but that will pay off the mortgage if one spouse dies.
- If the spouse/partner is not on the deed to your home, you may want to go through the trouble of having yourself added. Even if the service member has a will, if the spouse/partner is not on the deed, you may have to go through probate if and when you try to sell the home, even years later.

## Personal Property

Many times, if something is going to go wrong or break down with the house or auto, it's when the military member is away from home. Taking action on these things before you go may reduce the likelihood or even prevent it from happening.

### Home

- Notify your homeowners insurance company if your home will be vacant during your deployment
- Notify your renters insurance company if you are storing your belongings in a storage facility
- Inventory and photograph your personal property for insurance purposes
- Cancel any unnecessary utilities, phone services, cable, etc.
- Make any repairs or complete any maintenance that may need to be done prior to deploying
- Call your insurance company and give 3rd party authorization to a trusted individual to take care of your insurance matters while you are deployed

### Automobile(s)

- Check your insurance ID cards to make sure you have the most recent copy and keep a copy in your vehicle
- Ensure that maintenance records are up to date and kept in the vehicle or on SafelyFiled
- Complete any necessary vehicle maintenance (i.e. oil changes, transmission flushes, tires rotated, etc)
- Make sure the spare keys to your vehicle are kept in a safe place
- Keep Emergency Road Service cards in the vehicle
- If your vehicles will not be driven, contact your insurance company to see if there's a less expensive coverage plan while you're away

## Legal & Insurance

It is important that your family be able to take care of your legal and family business while you're away. Be sure to keep a copy of all of these documents that apply handy for your family or professional representative to access. It also serves as a good backup in the event the original is lost.

- Policies and Benefits—Go over insurance, investments, benefits, and beneficiaries, as well as the location of the policy documents. Be very clear about what is expected, explain the details, and make sure both of you write down your desires for future reference.
- Credit Card information. Make a list of your credit card account numbers and phone numbers. If you ever lose your credit cards, this list will be essential to quickly shutting down your accounts.
- Servicemembers' Group Life Insurance (SGLI)—Each active duty service member is eligible for life insurance, which is available in increments of \$10,000, up to a maximum of \$400,000. Before deployment, verify beneficiaries and make changes as necessary.
- General Durable Power Attorney—A general grant of authority that authorizes a spouse to act on behalf of the other in financial affairs. It can be revoked at any time and usually takes effect immediately unless otherwise stated in the document.
- Health Care Power of Attorney—This is for when one spouse becomes incapacitated and is unable to make medical decisions on his or her own, as determined by one or more physicians.
- Limited Power of Attorney—This document is intended to grant a spouse a limited amount of authority with regard to one or more matters. For example, it can grant the authority to make withdrawals from a specific bank account in order to pay bills, but nothing else.

## Contact & Other Important Info

In the event of an emergency at home while you're deployed it's a great peace of mind for your family if they know who to contact or how to get help in your absence.

- Defense Enrollment Eligibility Reporting System (DEERS)—Verifying DEERS enrollment prior to deployment will ensure that the family at home can receive medical care. To confirm enrollment contact DEERS at 1-800-538-9552 (<http://www.military.com/benefits/tricare/defense-enrollment-eligibility-reporting-system-deers.html>)
- ID Cards—Check the expiration date of all ID cards. If they expire prior to the end of the deployment, contact the appropriate personnel office to initiate the paperwork.
- Service Record—Check for the correct contact information in case of an emergency.
- Contact List—Compile a precise list of agencies, businesses, and units that offer assistance in case of an emergency. This is both for the family staying stateside, and the family member headed overseas.
- Leave contact info for first Sergeant and/or commander for spouse/family care provider in the event of an emergency
- Red Cross Notifications—The Red Cross is often the most efficient and rapid way to contact service members overseas. Write down your local Red Cross contact information, including phone number, address and hours. The Red Cross also has an entire section dedicated to helping military families on their Web site, [www.redcross.org](http://www.redcross.org).
- Spouse Relocation—It is imperative that command is notified with new contact numbers and addresses if the service member's family will be moving to a new location (back to a hometown, closer to family, etc.). If moving off post, housing authorities will need to be notified in advance of the move.
- Enroll in Paperless Policy and Paperless Billing options for easy access to policy documents
- Create a list of any computer or banking passwords your spouse or significant other may need to access (be sure to keep this in a very secure place)

