

Funeral Planning Guide



"In peace I will lie down and sleep, for you alone, Lord, make me dwell in safety." Psalm 4:8



American Legion Department of Ohio

60 Big Run Road

Delaware, OH. 43015

740-362-7478

ohiolegion.com

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Planning for Post Everlasting

Nobody wants to think about the inevitable, but it is important to ensure that our loved ones are taken care of and properly prepared when the time comes. This guide provides you and your loved ones with programs provided by the Department of Veterans Affairs available to eligible veterans and their families. Also provided is a planning guide related to your service, VA disabilities, and life after service to ensure that you and your family receive all the benefits available.

The American Legion Department of Ohio offers **free** assistance and representation not only to veterans filing claims and/or appeals with the Department of Veterans Affairs, but also to their dependents, both while living or in Post Everlasting. Our Department Service Officers (DSOs) are skilled advocates who are highly trained in the VA Benefits available to veterans and their families. The DSOs also represent veterans and their families at various levels of appeals within the VA. Assistance is always provided at **no cost** to our veterans and their families.

Department Service Officer Locations

Cleveland VA Regional Office:

1240 E. 9th Street, Room 1259

Cleveland, OH 44199

Phone: 216-522-3504 Fax: 215-713-1285 (William Genochio, Michelle Jones, Thomas White, Jessica “Nicole” Reese, and our Administrative Assistant Melissa Manzie)

Wade Park VA Medical Center:

10701 East Boulevard, Room 1B-417

Cleveland, OH 44106

Phone: 216-791-3800 ext. 64154 (Darell Bishop)

Chillicothe VA Medical Center:

17232 State Route 104, Bldg. 31, Room 128

Chillicothe, OH 45601

Phone: 740-773-1141 ext. 16252 (Troy Elliott)

Dayton VA Medical Center:

4100 W. 3rd Street

Bldg. 330, Room 1D-145E

Dayton, OH 45428 Phone: 937-268-6511 ext. 2967 (Gary Felver)

Department HQ:

60 Big Run Road

Delaware, OH 43015

Phone: 740-362-7478 (Jacob Brault)

Benefits Available for Eligible Veterans and Dependents from the Department of Veterans Affairs

Veterans Affairs Burial Allowance

VA burial allowances are one-time, flat-rate monetary benefits. They help cover the burial and funeral costs for eligible veterans. These amounts are periodically updated, so check with the local VA or visit <https://www.va.gov/burials-memorials/veterans-burial-allowance/> when the time comes, or you can call the American Legion Department of Ohio Service Officer team to assist.

- **Service-connected Deaths:** If a veteran died on or after September 11, 2001: the maximum benefit is \$2,000.00 toward the burial expenses. If the veteran is buried at a VA national cemetery, VA may reimburse some or all the costs of moving the veteran's remains. Please visit <https://www.va.gov/forms/21p-530ez/> for additional information and the corresponding form.
- **Non-service-Connected Deaths:** If the veteran died on or after October 1, 2025, the VA will pay a \$1,002 burial allowance and \$1,002 for a plot. Please visit <https://www.va.gov/forms/21p-530ez/> for additional information and the corresponding form.

Pre-Need Eligibility for National Cemetery Burial or Memorialization

Eligible veterans can apply in advance for burial in a VA National Cemetery. This will make it easier for your loved ones. Once confirmed, the VA will send a packet with your eligibility for burial in a VA National Cemetery. Details regarding eligibility can be found at <https://www.va.gov/burials-memorials/pre-need-eligibility/>. To apply for Pre-need, complete VA Form 40-10007 available at <https://www.va.gov/forms/40-10007/>.

Memorial or Burial Flags

A United States Flag is provided to drape the casket or accompany the urn of an eligible deceased veteran at no cost. Most funeral directors will have flags on hand to present to the family; however, the post office is the main issuing point. Only one flag per family will be provided. Eligibility can be viewed at <https://www.va.gov/burials-memorials/memorial-items/burial-flags/>. The application for a memorial or burial flag can be found at <https://www.vba.va.gov/pubs/forms/VBA-27-2008-ARE.pdf>.

Government Headstones or Markers

The VA may provide a single headstone, columbarium niche cover, or a flat marker for the veteran's final resting place, whether it is in a private, state, or a national cemetery. Further information can be found at <https://www.va.gov/burials-memorials/memorial-items/headstones-markers/>. To apply for a headstone or marker, visit <https://www.va.gov/vaforms/va/pdf/va40-1330.pdf>.

Cemetery Medallions

VA may provide a medallion to place on a headstone or other memorial in a private cemetery to show veteran status, and multiple sizes are available. For more information, visit <https://www.va.gov/burials-memorials/memorial-items/headstones-markers/>. To apply for a medallion, complete the form at <https://www.va.gov/vaforms/va/pdf/va40-1330.pdf>.

Presidential Memorial Certificates

The VA will provide Presidential Memorial Certificates (PMC) to the families of the deceased veterans. The PMC is an engraved certificate signed by the current President. For more information, visit <https://www.va.gov/burials-memorials/memorial-items/presidential-memorial-certificates/>. To apply for the PMC, visit <https://www.va.gov/vaforms/va/pdf/va40-0247.pdf>.

Burial Benefits and Automatic Payments

Burial benefits are paid to a spouse, designated family member, or executor to partially offset the cost of burial expenses, plot costs, and transportation costs for a veteran's remains. These benefits are paid at different rates based on whether the veteran's death was service-connected or non-service-connected. If the veteran was receiving VA benefits prior to passing and had a spouse of record, these benefits are usually paid automatically to the spouse. An application for **non-service-connected burial benefits must be submitted within two years from the date of death**. However, there is no time limit for a service-connected death. For more information, visit <https://www.benefits.va.gov/compensation/claims-special-burial.asp>. The application for burial benefits can be found at <https://www.vba.va.gov/pubs/forms/vba-21p-530ez-are.pdf>.

Dependency and Indemnity Compensation

Dependency and Indemnity Compensation (DIC) is a monthly, tax-free benefit provided to an eligible surviving spouse, dependent child(ren), and/or the parent(s) of a service member who died while on active duty, active duty for training, inactive duty training, or to survivors of veterans who died from a service-connected disability. To apply visit <https://www.va.gov/family-and-caregiver-benefits/survivor-compensation/dependency-indemnity-compensation/>.

Dependents' Educational Assistance Program

The Dependents' Educational Assistance Program offers education and training opportunities to eligible dependents, including dependents of veterans who are permanently and totally disabled due to a service-related condition, dependents of service members who died during active military service, or dependents of veterans who died as a result of a service-related condition.

Learn more at <https://www.va.gov/family-and-caregiver-benefits/education-and-careers/dependents-education-assistance/>.

Survivors Pension

A tax-free, monetary benefit payment to a low-income surviving spouse, who has not remarried and/or eligible unmarried child(ren) of a deceased wartime veteran, whose death is not service-related. Certain deductible expenses, such as an unreimbursed medical expense, may be used to reduce the survivor's countable income. Visit <https://www.va.gov/family-and-caregiver-benefits/survivor-compensation/survivors-pension/>.

Home Loans

VA can help eligible, unmarried surviving spouses (or those remarried after reaching age 57) become homeowners. This benefit may be used to help the surviving spouse buy, build, refinance, repair, and retain a home for their own personal occupancy. The surviving spouse must be in receipt of Dependency and Indemnity Compensation (DIC) and the surviving spouse of a veteran who: a) died while on active or select reserve service, b) from a service-connected cause, or c) was rated totally disabled for a certain period of time preceding death. Other surviving spouses include the spouse of a service member missing in action or a prisoner of war. For more information call 1-877-827-3702 or visit <https://www.va.gov/family-and-caregiver-benefits/housing-assistance/surviving-spouse-home-loan/>.

VA Life Insurance

VA provides valuable life insurance benefits to give you the peace of mind that comes with knowing your family is protected. VA's life insurance programs were developed to provide financial security for your family given the extraordinary risks involved in military service. For information, please visit <https://www.benefits.va.gov/insurance>.

How to Report the Death of a Veteran

It is important to report the death of a veteran to the Department of Veterans Affairs as soon as possible to avoid overpayment. Failure to report will lead to overpayment, for which payment(s) will be recouped.

To report a death, please be prepared to provide as much information as possible to verify the veteran including his/her full name, Social Security number or VA claim number, date of birth, date of death, and branch of service.

- **By phone** at 1-800-827-1000. This is the *fastest* way to have benefit payments stopped.
- **In person** at a VA regional office, copies of the following documents will be required:
 - Death certificate or other public record of the veteran's death
 - Discharge document (DD-214, separation papers)
- **By mail:**
Department of Veterans Affairs
Claims Intake Center
PO Box 4444
Janesville, WI 53547-4444

When reporting a veteran's death by mail, be sure to include your relationship to the veteran and any supporting documents that can help verify the veteran's identity.

Planning Now for Post Everlasting

For the veteran:

- Let your family know about your military service and any VA disabilities for which you are service connected.
- Tell them the location of your separation documents, DD-214, VA Rating Decision.
- Inform loved ones of your plans regarding burial. If you would like to be buried in a VA National Cemetery, apply now for the Pre-need burial eligibility.
- Discuss whether any of the life insurance programs VA offers are needed to help cover any of your final expenses.
- Be sure to complete and annually review your life insurance beneficiary designation(s), which will make it much easier to file a claim and receive benefits quickly.

For the family, as the veteran is approaching end of life:

- Speak to the veteran's doctor about how to obtain copies of medical records before and after the veteran's passing in case they may be needed in the future.
- Discuss with the veteran where and when they have received treatment for any medical conditions that you believe may have been incurred in, or exacerbated by, their military service.
- If you believe the veteran may be entering into their period of final illness, begin keeping a record of any medical expenses related to that final illness.
- If the veteran wishes to be interred in a national cemetery, locate their pre-need burial approval (if they applied), or clarify their wishes as to where they would like to be interred.

For the parents, spouse, or dependent child(ren), after the veteran's passing:

- Consider if you wish to apply for VA Survivors Pension or DIC.
- If the veteran had a VA life insurance policy or other policy, prepare and submit a claim with the required supporting documentation.
- If you have a medical condition, disease, or injury which necessitates the aid and attendance of another person in performing your activities of daily life or are housebound, have your physician complete a statement outlining your medical condition.
- If you believe the veteran's death was related to a condition incurred during or exacerbated by military service, obtain copies of any private medical records from the veteran's physician (VA hospital records and military medical records can be obtained by VA).

Applying for Benefits

| BENEFIT | REQUIRED FORM | SUPPORTING DOCUMENTS |
|--|---|---|
| National Cemetery Pre-need | VA Form 40-10007 | DD-214 |
| Burial Flag | VA Form 27-2008 | DD-214 |
| Government Medallion | VA Form 40-1330M | DD-214 |
| Headstone or Marker | VA Form 40-1330 | DD-214 |
| Burial Benefits | VA Form 21P-530EZ | veteran's military discharge death certificate |
| DIC for Surviving Spouse and/or Child(ren) | VA Form 21P-534EZ | veteran's military discharge death certificate declaration of status of dependents (VA Form 21-686c) |
| Dependents' Educational Assistance Program (DEA) | VA Form 22-5490 | DD-214 |
| VA Home Loan | VA Form 26-1817 | DD-214 |
| VA Life Insurance programs | https://benefits.va.gov/insurance/ | military or VA disability rating documents military separation documents mortgage documents |

Seeking Assistance Filing for Benefits

Applying for VA benefits, especially while grieving the death of a loved one can be difficult and confusing. However, several organizations exist to help you navigate this process, usually cost-free. Help with the claims process is available at the American Legion Department Ohio (in Delaware, OH) or:

American Legion - Cleveland VA Regional Office: Phone: 216-522-3504 fax: 215-713-1285
1240 E. 9th Street, Room 1259, Cleveland, OH 44199

Wade Park VA Medical Center: Phone: 216-791-3800 ext. 64154
10701 East Boulevard, Room 1B-417, Cleveland, OH 44106

Chillicothe VA Medical Center: Phone: 740-773-1141 ext. 1625217232 St. Rt. 104, Bldg. 31, Room 128, Chillicothe, OH 45601

Dayton VA Medical Center: Phone: 937-268-6511 ext. 2967
4100 W. 3rd Street, Bldg. 330, Room 1D-145E, Dayton, OH 45428

All 88 County Veteran Service Commissions in Ohio:
<https://dvs.ohio.gov/resources-for-veterans/find-a-cvso>

VA Contact Information

If you wish to speak directly to a VA representative, contact VA at the following phone numbers:

- For burial, Survivors Pension, DIC, or other benefits: 1-800-827-1000
- For the status of VA headstones and markers: 1-800-697-6947
- For obtaining bereavement counseling: 1-877-927-8387
- For VA Life Insurance information related to Servicemembers' Group Life Insurance, Traumatic Servicemembers' Group Life Insurance, Family Servicemembers' Group Life Insurance, and Veterans' Group Life Insurance: 1-800-419-1473.
- For Veterans' Mortgage Life Insurance or other VA insurance programs call: 1-800-669-8477.
- The website for all of the above is <https://www.benefits.va.gov/insurance/>.

To apply for any VA benefits, a complete application and possibly additional forms will need to be submitted. To ensure speedy and accurate processing of any claim for VA benefits, it is especially important to complete these forms correctly. Assistance is available from the American Legion Department of Ohio, Department Service Officer Team, or your County Veteran Service Office.

Tips on Completing VA Forms

- Complete every item on the form, even if your answer is “not applicable,” “none,” or “0.” Incomplete applications are one of the major avoidable causes of denials and delays in processing.
- The person claiming benefits (the “claimant” for instance, the surviving spouse claiming death pension) must sign the form themselves. VA cannot recognize private power-of-attorney agreements, and family members cannot sign documents for other family members.
- VA Forms are periodically updated. Current VA forms can be obtained at <https://www.va.gov/forms/> or your local veterans service office.
- Visit <https://www.benefits.va.gov/INSURANCE/resources-forms.asp> to obtain forms related to life insurance claims.

**The following pages are a rough-draft planning guide. The intent is to provide a template to aid your loved ones when the time arises. This guide may not have all the information they may need at the time of death. But we do hope it provides peace of mind so that when moving on to Post Everlasting, everything they need to honor your life and service to our great nation is in place.*

Burial Planning Guide

Record of Personal Affairs

| | | |
|---------------------------|--------------------|-------------------------|
| First Name | Middle Name | Last Name |
| Military Rank/Grade | Branch of Service | Social Security Number |
| Address | City and State | Zip Code |
| Service # (if applicable) | Service Entry Date | Service Completion Date |
| Military Discharge | | |

Date and Place of Birth

| | | |
|----------------|----------------|----------|
| Month/Day/Year | City and State | Zip Code |
|----------------|----------------|----------|

Parents' Information

| | | |
|---------------------|-------------|-----------|
| Father's First Name | Middle Name | Last Name |
| Mother's First | Middle Name | Last Name |

Children's Information

| | | | |
|----|------------|-------------|-----------|
| 1. | First Name | Middle Name | Last Name |
| 2. | First Name | Middle Name | Last Name |
| 3. | First Name | Middle Name | Last Name |
| 4. | First Name | Middle Name | Last Name |
| 5. | First Name | Middle Name | Last Name |
| 6. | First Name | Middle Name | Last Name |

Your Marital History

| | | |
|--|-----------|--------------------------|
| Spouse's Name | Birthdate | Social Security Number |
| Location of Marriage (City/State/County) | | Date of Marriage |
| Spouse's Prior Name (if applicable) | | Date of Prior Marriage |
| Your Total Marriages | | Spouse's Total Marriages |

Trusted Associate

List a personal lawyer or a trusted friend who may be consulted regarding your personal or business affairs.

| | | |
|--------------|----------------|-----------|
| First Name | Middle Name | Last Name |
| Address | City and State | Zip |
| Phone Number | Email Address | |

Location of Family Records

To aid your family, in the space below, list the physical location of important documentation and records. Documents may include birth certificates, adoption paperwork, marriage certificates, naturalization papers, divorce decrees, death certificates, tax documents, etc.

[illegible]

Will

Do you have a will? __YES __NO

Location of Will

Lawyer's Name

Law Firm

Phone Number

Executor's Name

Relationship

Phone Number

Durable Power of Attorney

(This is *not* VA PoA for representation.)

Name

Relationship

Phone Number

Address

City and State

Zip Code

Bank Accounts

List any physical or online banks or credit unions, their phone numbers, the account numbers, names of any joint account holders, and the corresponding account numbers.

1. _____
2. _____
3. _____
4. _____
5. _____

Credit Cards

List the credit card companies, their telephone numbers, and the corresponding account numbers.

1. _____
2. _____
3. _____
4. _____
5. _____
- 6.. _____
7. _____
8. _____
9. _____
10. _____

Important Financial Documents

List the location of important financial documents, including stocks, savings bonds, mutual funds, 401K, certificates of deposit, safe deposit box, etc.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Real Estate

If your family needs assistance with your home loan, they can call 1-877-827-3702. An existing VA home loan is not required to request assistance.

Address of Primary Residence

Mortgage Institution

Location of Mortgage Note

Property Insurance Company

Policy Number

Investment Properties

List any investment properties along with the address and location of the deed/note.

Vehicles Owned

List the year, make, model and vehicle ID number (VIN) for each vehicle you own.

1. _____
2. _____
3. _____
4. _____
5. _____

Life Insurance

Place a check mark beside the type/types of life insurance you have. (Check all that apply).

| X | Type of Insurance |
|----------|---|
| | Department of Veterans Affairs Sponsored Life Insurance |
| | Government Employee (Federal Employee Group Life Insurance – FEGLI) |
| | Private Employer Sponsored Life Insurance |
| | Private Life Insurance |

Insurance Company

Control/Policy Number

Face Value (Dollars)

Beneficiary Information

Name of Beneficiary

Relationship

Address

Phone Number

Payment Type

Use the space below to list **any additional insurances** you may have including health and auto.

Annuities

Government or Private

Payable to (Full Name)

Monthly Amount

Address

City, State and Zip Code

Phone Number

Employer Benefits

Whether employed or retired, list any survivor benefits that may be payable.

Employer

Survivor Benefit

Address

City, State and Zip Code

Phone Number

List any organizations with which you are affiliated that might assist your survivors, including any other veteran service organizations.

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Funeral and Burial Arrangements

| | |
|------------------|------------------|
| Funeral Location | Funeral Director |
| Address | Phone Number |

Church, Clergy, or Desired Officiant

| | | |
|---|---------------------------|--------------|
| Name of Church/Institution/Organization | Clergyperson/Officiant | |
| Address | City, State, and Zip Code | Phone Number |

For Those Who Wish to be Interred in a VA National Cemetery

| | | |
|----------------|------------------------|------------------------|
| Date of Birth | Social Security Number | Rank/Branch of Service |
| Entry Pay Date | Date of Separation | Service Number |

Other suggestions and/or wishes

| |
|--|
| |
| |
| |
| |
| |

Wishes for Burial and Funeral Service Arrangements

| | | |
|-----------------------|------------|--------------|
| Name of Resting Place | City/State | Phone Number |
|-----------------------|------------|--------------|

Hymns, Psalms, Scriptures, Poetry, or Special Requests

| |
|--|
| |
| |
| |
| |

Flowers / Memorial (in lieu of flowers)

| |
|--|
| |
| |

Memorial and Remembrance

Indicate Emblem of Choice for VA Form 40-1330

Do you have a burial plot? ☐ YES ☐ NO

Pallbearers (if applicable)

List pallbearers

Special Instructions**Obituary**

Additional Considerations

Ensure the following are conducted through proper legal channels:

- **Do you have a “do not resuscitate” (DNR) order? __YES __NO**
- **Do you have a Living Will/Health Directive? __YES __NO**
- **Checklist of Important Documents:**

The following documents may be needed by survivors. Use the table below to check off the documents you have and provide their location.

| X | Document | Location |
|----------|--|-----------------|
| | military discharge documents | |
| | death certificates, 12 copies recommended | |
| | deceased's birth certificate | |
| | spouse's birth certificate | |
| | minor/adult children's birth certificates | |
| | marriage license | |
| | other important documents | |

Other resources and organizations that can assist you.

This image shows a single sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Resources

American Legion Department of Ohio:

<https://www.ohiolegion.com/>

Ohio Department of Veterans Services (ODVS):

<https://dvs.ohio.gov/home>

American Legion National:

<https://www.legion.org/>

VA Website for Funeral Information:

<https://www.va.gov/burials-memorials/veterans-burial-allowance/>

National Cemetery:

<https://www.cem.va.gov/>

National Cemetery Scheduling Line: 1-800-535-1117

Ohio Western Reserve National Cemetery:

<https://www.cem.va.gov/cems/nchp/ohiowesternreserve.asp>

Dayton National Cemetery:

<https://www.cem.va.gov/CEM/cems/nchp/dayton.asp>

Veterans Affairs:

<https://www.va.gov/>

VA Bereavement Counseling:

<https://www.va.gov/burials-memorials/bereavement-counseling/>

VA Suicide Prevention:

<https://www.va.gov/health-care/health-needs-conditions/mental-health/suicide-prevention/>