

# Pre-Deployment **CHECKLISTS** ✓

Once your spouse has deployed, it's too late to get his or her signature on a will or have a power of attorney drawn up. Preparedness is the key to surviving a lengthy deployment. By planning ahead and anticipating all contingencies while the service member is away, assuming responsibility for the family safety, household finances, automobiles, banking and legal matters, medical, and housing issues will be much easier for the spouse or trusted family member.

Below are some of the important steps to be taken and essential phone numbers and documents that must be acquired prior to the separation.



U.S. Air Force / Staff Sgt. Sayaruth Phitrong

## EMERGENCY CONTACT INFORMATION FOR DEPLOYED MEMBER

This information on the service member and his or her whereabouts will help the spouse or trusted family member contact the deployed member in case of an emergency. It should be kept near the phone.

Social Security Number: \_\_\_\_\_  
 Date/Place of Birth: \_\_\_\_\_  
 Rank: \_\_\_\_\_  
 ID Card Number: \_\_\_\_\_  
 Military Unit: \_\_\_\_\_  
 Unit Telephone Number: \_\_\_\_\_  
 Deployed Location (if releasable): \_\_\_\_\_  
 Deployed Mailing Address (if applicable): \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Blood Type: \_\_\_\_\_  
 Family Readiness Contact Person: \_\_\_\_\_  
 Family Readiness Contact Person: \_\_\_\_\_  
 Telephone Number \_\_\_\_\_  
 Local Chapter of the Red Cross: \_\_\_\_\_  
 Chaplain: \_\_\_\_\_  
 Healthcare Contact Person: \_\_\_\_\_  
 Rear Detachment Commander: \_\_\_\_\_  
 Rear Detachment Commander's Telephone Number: \_\_\_\_\_  
 \_\_\_\_\_

In the event of an emergency, contact the local chapter of the Red Cross. The Red Cross delivers an average of 4,000 messages a day. Visit the Red Cross website at [www.redcross.org](http://www.redcross.org).

In addition, you can call the Rear Detachment Commander, Family Assistance Center or the Guard or Reserve Family Program Coordinator. Provide them with the service member's full name, SSN, nature of the emergency and the service member's military unit. Tell them that you've contacted the Red Cross.

## HOUSEHOLD EMERGENCY CONTACT INFO

This information should be kept near the phone at all times.

Police: \_\_\_\_\_  
 Fire Department: \_\_\_\_\_  
 Ambulance: \_\_\_\_\_  
 Poison Information Center: \_\_\_\_\_

## BASE SUPPORT AGENCIES AND PROGRAMS

Seeking help from on-base agencies will help keep a problem from turning into a crisis:

### MEDICAL OFFICES

Bldg. # \_\_\_\_\_  
 Phone: \_\_\_\_\_

### DENTAL OFFICE

Bldg. # \_\_\_\_\_  
 Phone: \_\_\_\_\_

### FAMILY CENTER

(Family Services, EFMP, financial assistance, etc.)

Bldg. # \_\_\_\_\_  
 Phone: \_\_\_\_\_

### CHILDREN'S SCHOOL

Location: \_\_\_\_\_  
 Phone: \_\_\_\_\_

### LEGAL ASSISTANCE

(powers of attorney, wills, and other legal issues)

Bldg. # \_\_\_\_\_  
 Phone: \_\_\_\_\_

## MONTHLY INCOME

Adhering to a budget is very important, especially if the service member's monthly income is negatively affected by the deployment. Creating a family budget plan should be a priority prior to a separation.

Base Pay: \$ \_\_\_\_\_  
 Quarters Allowance: \$ \_\_\_\_\_  
 Cost-of-Living Allowance (COLA): \$ \_\_\_\_\_  
 Basic Allowance for Subsistence: \$ \_\_\_\_\_  
 Other Allowances: \$ \_\_\_\_\_  
 Total Monthly Income: \$ \_\_\_\_\_  
 \_\_\_\_\_  
 Federal Withholding Tax: \$ \_\_\_\_\_  
 State Withholding Tax: \$ \_\_\_\_\_  
 FICA Tax (Social Security): \$ \_\_\_\_\_  
 SGLI: \$ \_\_\_\_\_  
 Allotments: \$ \_\_\_\_\_  
 Miscellaneous Deductions: \$ \_\_\_\_\_  
 Total Monthly Income after Taxes: \$ \_\_\_\_\_

## HOUSEHOLD EXPENSES

The following list includes some of the monthly payments that must be calculated into the monthly budget:

- |  |  |
|--|--|
| <input type="checkbox"/> Rent/mortgage payment   | <input type="checkbox"/> Life/fire and/or homeowner's insurance            |
| <input type="checkbox"/> Automobile (loan amount, insurance, maintenance)  |  |
| <input type="checkbox"/> Utilities (gas, electricity, telephone, heating, sewage and water)  |  |
| <input type="checkbox"/> Food (including pet supplies)   | <input type="checkbox"/> Cable TV/Internet                                 |
| <input type="checkbox"/> Cell phone/pager  | <input type="checkbox"/> Child care  |
| <input type="checkbox"/> Debt/loan/credit card payments  | <input type="checkbox"/> Taxes   |
| <input type="checkbox"/> Emergencies   |  |
| <input type="checkbox"/> Communication costs to stay in contact with the deployed member (video telephone, mailing/care packages, morale calls)  |  |
| <input type="checkbox"/> Gasoline  | <input type="checkbox"/> Personal items (toiletries, hair, clothing, etc.) |
| <input type="checkbox"/> Recreation/entertainment  |  |
| <input type="checkbox"/> Miscellaneous (furniture, appliances, entertainment, children's allowance including lessons, gifts, charitable contributions, dry cleaning/laundry, veterinarian expenses). |  |

## FAMILY MEMBER CHECKLIST

- Prepare personal financial and business files for important documents.
- Each family member should have a valid ID card before the separation occurs.
- Keep an account of when the ID cards will need to be updated if renewal takes place while the service member is deployed.
- The service member needs to fill out and sign a DD Form 1172 form. This is an application for the DoD Common Access Card — DEERS enrollment. This can be obtained at the unit personnel office. DEERS can also be reached at (800) 538-9552.
- Verify DEERS enrollment for all family members.
- Update immunizations for family members.

## IMPORTANT DOCUMENTS

The family member or trusted family friend in charge of the finances should have access to the following important documents:

- Military orders for the service member (nine copies)
- Birth certificates for all family members
- Social Security cards
- Marriage certificate(s)
- Divorce decree(s)
- Alimony papers
- Child support papers
- Adoption papers
- Death certificate(s)
- Power of attorney papers (three copies)
- Copies of SGLI (Servicemembers' Group Life Insurance) benefits paperwork
- Wills (sponsor and spouse)
- Real estate documents: Deeds/mortgages/titles/leases
- State and federal tax records for past five years
- Car registration and/or title
- Copies of all insurance policies (life, auto, fire/homeowners/renters, earthquake, other)
- U.S. savings bonds/stocks/securities
- All outstanding loan paperwork, including name, address and account number of each company
- School registration forms
- Immunization records
- Naturalization/citizenship papers/current passports
- Copies of all current medical, dental and vision prescriptions for each family member
- Addresses and telephone numbers for all members of immediate families for spouse and military member

## BANKING CHECKLIST

Both the service member and the spouse should be listed on all joint banking accounts. They both should be able to make deposits/withdrawals and changes on the accounts without the signature of the other. Furthermore, if applicable, make sure your bank will accept a power of attorney. The spouse should have access to bank books and checkbooks.

In addition, to expedite the transfer of money, direct deposit should be established on appropriate checking accounts. Both the spouse and service member should have the following information available to them:

Bank name: \_\_\_\_\_  
Telephone number for bank: \_\_\_\_\_  
Address/location: \_\_\_\_\_  
Checking account number: \_\_\_\_\_  
Savings account number: \_\_\_\_\_  
PIN numbers for each account: \_\_\_\_\_  
Safe deposit box location and key: \_\_\_\_\_

Many banking-related institutions, such as USAA, Navy Federal Credit Union, Pentagon Federal Credit Union, and Wells Fargo now offer worldwide online access. In addition, financial institutions are increasingly offering online bill payment services. If you have Internet access, this is an excellent way to stay on top of bills and payments from anywhere in the world.

## MEDICAL CHECKLIST

- The spouse and/or caretaker needs to know the name and number of the children's physician, dentist/orthodontist and eye care professional.
- All immunizations should be up to date.
- Spouse or caretaker should have access to all medical, dental and vision records.

## AUTOMOTIVE CHECKLIST

If you are assuming the responsibility of the keeping the car(s) tuned up and running, the following information is essential when going to the mechanic.

- Mileage at last tune up: \_\_\_\_\_

*continued on next page*

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- Mileage at next scheduled tune up: \_\_\_\_\_
- Name/number and location of mechanic: \_\_\_\_\_  
\_\_\_\_\_
- What type of gasoline should the car be filled with?  
\_\_\_\_\_
- What grade of oil does the car require? \_\_\_\_\_
- When does the oil need replacing? \_\_\_\_\_
- When will the chassis U-joints and steering linkage need lubing? \_\_\_\_\_
- What kind of battery should be purchased and which post polarity (positive right or left)? \_\_\_\_\_  
\_\_\_\_\_
- Will the tires need rotating. If so, when? \_\_\_\_\_  
\_\_\_\_\_
- Will the tires need replacing during the deployment? If so, when and what size and type should be purchased?

- What other maintenance should be performed during the deployment? What is the schedule for those maintenance tasks? \_\_\_\_\_  
\_\_\_\_\_
- Where is the spare set of keys kept? \_\_\_\_\_  
\_\_\_\_\_

## HOUSING CHECKLIST

Each family member should know the location of the:

- Electrical box
- Water and gas control valves
- Name and phone number for the plumber, housing office, and/or electrician
- First-aid kit (medical kit, enough water and non-perishable food for a week for each family member, flashlights with spare batteries, radio with spare batteries, extra blankets and clothing for each family member)
- Fire extinguisher(s)

In addition, the spouse or caretaker should have a spare set of keys for the home and automobile(s). All smoke detectors should be operable. Replace any used batteries.



U.S. Navy / William H. Ramsey

## DEPLOYMENT HELP

### IRS Tax Assistance

By Carmen L. Gleason  
American Forces Press Service

IRS tax laws provide special benefits to active-duty service members, particularly those in combat zones. For federal tax purposes, "armed forces" includes officers and enlisted members in regular and reserve units controlled by the secretaries of Defense, Army, Navy and Air Force, in addition to the Coast Guard.

According to the IRS website, three combat zones have been designated by executive order from the president in areas where armed forces are or have engaged in combat, this includes the air space above those areas. These are the Arabian Peninsula, Kosovo and Afghanistan.

The Defense Department also has certified locations for combat zone tax benefits due to the direct support of military operations during operations Iraqi and Enduring Freedom. A listing of these locations can be found at [www.irs.gov/newsroom](http://www.irs.gov/newsroom) by clicking on the "Armed Forces" tab.

Those who qualify for combat zone provisions can apply for military pay exclusions, deadline extensions and miscellaneous provisions by writing "combat zone" and their deployment date in red ink on the top of tax returns.

Qualifying taxpayers may directly notify the IRS of their exclusion status by e-mailing [combatzone@irs.gov](mailto:combatzone@irs.gov). Service members should provide name, stateside address, date of birth, and date of deployment to the combat zone. They should not include social security numbers in an e-mail. This notification may be made by the taxpayer, spouse, or

authorized agent or representative.

Enlisted members and warrant officers serving in a combat zone for any part of a month qualify to have all military pay for that month excluded from gross income tax. Officers' monthly exclusions are capped at the highest enlisted pay rate, plus hostile fire or imminent danger pay.

Telephone calls originating in combat zones by members of the armed forces are also exempt from federal excise tax and must be certified for exemption by the telephone company. If service members already have filed, they can still apply for a refund.

Recent law changes also have allowed military members to count tax-free combat pay when determining contributions to Roth and traditional individual retirement accounts. This also can apply to taxes filed since 2004. Troops are allowed to make contributions for those years.

### Vehicle Processing Centers

Service members need to consult their local transportation office to determine the proper VPC from which to ship or store their privately owned vehicle. The "Shipping and Storing your POV" pamphlet contains a listing of all CONUS/OCONUS VPC locations including toll-free numbers.

A copy of the pamphlet can be found on the MTMC website at <http://www.mtmc.army.mil>. Once you enter the site, click on the Personal Property/POV link at the top of the screen. Scroll down to the bottom of the screen that pops up and then click on the Storing Your POV link on the left side of the window. Click on the "Shipping and Storing Your POV" pamphlet link on the left side of the third window. A pdf of the pamphlet will appear on the screen.