



PRE-DEPLOYMENT READINESS CHECKLIST

Complete Military Document & Planning Guide



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MEMORIAL MERITS
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Complete Military Document & Planning Guide

About This Checklist

This comprehensive checklist ensures you've covered every critical detail before deployment—not just what your command requires, but everything your family actually needs to be protected.

Unlike standard military checklists, this guide addresses the gaps between different systems (Page 2, SGLI, DEERS), includes digital asset planning, provides mental health resources for families, and ensures total coverage and protection.

How to Use This Guide:

- ☐ Print this document and keep it in your deployment folder
- ☐ Check each box as you complete items
- ☐ Fill in all information fields (account numbers, locations, contacts)
- ☐ Give a complete copy to your Power of Attorney holder
- ☐ Update this document every 6 months or when circumstances change

Read the full guide at: <https://memorialmerits.com/9-critical-documents-military-members-need-before-deployment-that-your-command-wont-mention/>

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DEPLOYMENT PREPARATION TIMELINE

90 Days Before Deployment

- ☐ Schedule JAG appointment for legal documents
- ☐ Begin compiling account information and digital asset inventory
- ☐ Review and update existing will if you have one
- ☐ Verify all insurance policies and beneficiaries
- ☐ Connect family with support resources and counseling if needed

30 Days Before Deployment

- ☐ Complete all Powers of Attorney (Financial AND Healthcare)
- ☐ Verify Page 2, SGLI, and DEERS all match and are current
- ☐ Get physical copies of all critical documents
- ☐ Complete digital asset access instructions
- ☐ Brief your family on where everything is located
- ☐ Set up automatic bill payments and allotments

72 Hours Before Deployment

- ☐ Final review of all documents with your POA holder
- ☐ Verify POA holder has copies of everything
- ☐ Write/record legacy letters and messages
- ☐ Review funeral and burial wishes with family
- ☐ Confirm all contact information is current
- ☐ Final verification that Page 2, SGLI, DEERS all match

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SECTION 1: CORE LEGAL DOCUMENTS

1. Financial Power of Attorney

- ☐ Completed and notarized
- ☐ Durable (remains valid if incapacitated)
- ☐ General POA (covers all financial matters) OR Special POA (specific transactions)

Person Designated: _____

Contact Number: _____

Date Completed: _____

Document Location: _____

Copies Given To: _____

Resource: Base JAG/Legal Assistance Office (FREE) - Call 800-342-9647 for nearest location

2. Healthcare Power of Attorney & Advanced Directive

- ☐ Healthcare POA completed and notarized
- ☐ Advanced Directive/Living Will completed
- ☐ Organ donation wishes documented
- ☐ Copies given to POA holder, primary care physician, and family

Person Designated: _____

Contact Number: _____

Date Completed: _____

Life Support Wishes: _____

Organ Donor: ☐ Yes ☐ No ☐ Specific Organs: _____

Resource: TRICARE Advanced Directives: www.tricare.mil/lifeevents/advanceddirectives

3. Last Will and Testament

- ☐ Will completed and properly executed (signed and witnessed)
- ☐ Guardian designated for minor children (if applicable)
- ☐ Executor/Personal Representative named
- ☐ Specific property distribution instructions included
- ☐ Verified will does NOT conflict with SGLI or beneficiary designations

Date Completed: _____

Executor: _____

Executor Contact: _____

Guardian (if applicable): _____

Original Will Location: _____

CRITICAL NOTE: SGLI proceeds do NOT go through your will. They go to your designated SGLI beneficiaries. Make sure your will and SGLI designations work together, not against each other.

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SECTION 2: BENEFICIARY & SYSTEM VERIFICATION

CRITICAL: Page 2, SGLI, and DEERS are THREE SEPARATE SYSTEMS. Updating one does NOT update the others. You must verify all three independently.

4. Page 2 (DD Form 93 - Record of Emergency Data)

What it is: Lists next of kin for NOTIFICATION purposes only. Does NOT determine who gets benefits or life insurance.

- ☐ Page 2 updated with current information
- ☐ Physical copy obtained and stored in deployment folder
- ☐ Verified with personnel/admin office

Date Last Updated: _____

Primary Next of Kin: _____

Relationship: _____

5. SGLI (SGLV 8286 - Servicemembers' Group Life Insurance)

What it is: \$500,000 life insurance benefit. THIS IS SEPARATE FROM PAGE 2. These are the people who will actually receive your life insurance money.

- ☐ SGLV 8286 form completed with current beneficiaries
- ☐ Physical signed/stamped copy obtained
- ☐ Contingent beneficiaries listed (in case primary dies first)
- ☐ Percentages add up to 100%
- ☐ Verified no ex-spouses still listed
- ☐ Children listed by FULL NAME (not 'my children')

Date Last Updated: _____

Primary Beneficiary #1: _____

Percentage: _____ % **Relationship:** _____

Primary Beneficiary #2: _____

Percentage: _____ % **Relationship:** _____

Contingent Beneficiary: _____

Resources: Update at milConnect (milconnect.dmdc.osd.mil) or through your admin office

SGLI Info: www.va.gov/life-insurance/options-eligibility/sgli/

Benefits Hotline: 800-419-1473

6. DEERS Enrollment Verification

What it is: Defense Enrollment Eligibility Reporting System. Determines who can access TRICARE, commissary, and other military benefits. SEPARATE from Page 2 and SGLI.

- ☐ Spouse enrolled in DEERS (if applicable)
- ☐ All dependent children enrolled in DEERS
- ☐ All dependents have valid ID cards
- ☐ Verified enrollment is current (especially if recently married or had children)

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Last Verification Date: _____

Update DEERS: Call 800-538-9552 or visit ID card office (RAPIDS site)

Verify DEERS: milConnect portal at milconnect.dmdc.osd.mil

CRITICAL CROSS-VERIFICATION CHECKLIST

- ☐ Page 2, SGLI, and DEERS all reviewed and updated
- ☐ If married: spouse is listed correctly in ALL three systems
- ☐ If divorced: ex-spouse removed from ALL three systems
- ☐ Children listed correctly in all systems (especially stepchildren or adopted)
- ☐ Physical copies of Page 2 AND SGLV 8286 obtained and stored
- ☐ POA holder has copies of all beneficiary documents

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SECTION 3: DIGITAL ASSETS & ACCOUNT ACCESS

7. Digital Asset Inventory & Access Instructions

- ☐ Complete list of all digital accounts created
- ☐ Password manager set up with emergency access
- ☐ Two-factor authentication backup codes saved
- ☐ Social media account wishes documented
- ☐ POA holder knows how to access all accounts

Email Accounts:

Primary Email: _____

Secondary Email: _____

Work Email: _____

Financial/Banking Apps:

PayPal: _____

Venmo: _____

CashApp: _____

Cryptocurrency Wallets: _____

Investment Apps: _____

Cloud Storage & Photos:

iCloud: _____

Google Photos: _____

Dropbox: _____

OneDrive: _____

Social Media Wishes:

Facebook: ☐ Memorialize ☐ Delete ☐ Transfer to: _____

Instagram: ☐ Memorialize ☐ Delete ☐ Transfer to: _____

Twitter/X: ☐ Keep ☐ Delete ☐ Transfer to: _____

LinkedIn: ☐ Memorialize ☐ Delete ☐ Transfer to: _____

Password Manager Information:

Password Manager Used: ☐ LastPass ☐ 1Password ☐ Dashlane ☐ Other: _____

Master Password Location: _____

Emergency Access Designated To: _____

Resources:

- Google Inactive Account Manager: myaccount.google.com/inactive
- Facebook Legacy Contact: www.facebook.com/help/1568013990080948
- Digital Estate Planning Guide: www.thedigitalbeyond.com

Read the full guide at: <https://memorialmerits.com/9-critical-documents-military-members-need-before-deployment-that-your-command-wont-mention/>

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SECTION 4: COMPLETE FINANCIAL ACCOUNT INVENTORY

8. Bank Accounts & Financial Assets

Checking Accounts:

Bank #1: _____

Account Number: _____ **Balance:** \$ _____

Online Access: _____

Bank #2: _____

Account Number: _____ **Balance:** \$ _____

Online Access: _____

Savings Accounts:

Bank: _____

Account Number: _____ **Balance:** \$ _____

Investment Accounts:

TSP (Thrift Savings Plan):

Account Number: _____ **Balance:** \$ _____

Beneficiary: _____

IRA/401(k): _____

Account Number: _____ **Balance:** \$ _____

Beneficiary: _____

Brokerage Account: _____

Account Number: _____ **Balance:** \$ _____

Insurance Policies:

SGLI: \$500,000 (automatic for active duty)

Private Life Insurance Company: _____

Policy Number: _____ **Coverage:** \$ _____

Beneficiary: _____

Debts & Liabilities:

Credit Card #1: _____ **Balance:** \$ _____

Credit Card #2: _____ **Balance:** \$ _____

Auto Loan: _____ **Balance:** \$ _____

Student Loans: _____ **Balance:** \$ _____

Mortgage: _____ **Balance:** \$ _____

Personal Loans: _____ **Balance:** \$ _____

Property & Vehicles:

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Primary Residence Address: _____

Deed Location: _____

Vehicle #1: _____

VIN: _____

Title Location: _____

Vehicle #2: _____

VIN: _____

Title Location: _____

9. Safe Deposit Box Information

- ☐ I have a safe deposit box
- ☐ POA holder has access or knows location of key
- ☐ Original will is NOT stored in box (store copy only)

Bank Name & Branch: _____

Box Number: _____

Key Location: _____

Authorized Access: _____

Contents (general): _____

Read the full guide at: <https://memorialmerits.com/9-critical-documents-military-members-need-before-deployment-that-your-command-wont-mention/>

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SECTION 5: FUNERAL, BURIAL & MEMORIAL WISHES

10. Funeral & Memorial Service Preferences

- ☐ Funeral preferences documented and discussed with family
- ☐ Military honors preferences specified
- ☐ Music and readings selected
- ☐ Burial or cremation preference documented

Service Type:

- ☐ Traditional funeral service
- ☐ Memorial service (no body present)
- ☐ Celebration of life
- ☐ Private family only
- ☐ No service

Religious or Secular: _____

Preferred Location: _____

Military Honors:

- ☐ Full military funeral with honor guard
- ☐ Flag folding ceremony
- ☐ Playing of Taps
- ☐ Rifle volley (21-gun salute)
- ☐ Branch-specific traditions

Burial or Cremation:

- ☐ Burial (full body)
- ☐ Cremation

If Burial - Cemetery Preference: _____

- ☐ Arlington National Cemetery
- ☐ VA National Cemetery (location: _____)
- ☐ Private cemetery (location: _____)
- ☐ Family plot (location: _____)

If Cremation - Wishes for Ashes:

- ☐ Scattered (location: _____)
- ☐ Buried in cemetery
- ☐ Kept by family member
- ☐ Divided among family

Music & Readings:

Song #1: _____

Song #2: _____

Readings/Poems: _____

Speakers (if any): _____

Read the full guide at: <https://memorialmerits.com/9-critical-documents-military-members-need-before-deployment-that-your-command-wont-mention/>

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Resources:

- Military Funeral Honors: www.militaryonesource.mil/family-relationships/preparing-for-death/military-funeral-honors
- VA Burial Benefits: www.va.gov/burials-memorials/
- National Cemetery Administration: www.cem.va.gov
- Arlington National Cemetery Eligibility: www.arlingtoncemetery.mil

11. Legacy Letters & Personal Messages

- ☐ Letter to spouse/partner written
- ☐ Individual letters to each child written
- ☐ Letters for future milestones (graduations, weddings) written
- ☐ Letter to parents written
- ☐ Video messages recorded
- ☐ Letters stored in sealed envelopes with clear instructions

Storage Location: _____

Person Holding Letters: _____

Read the full guide at: <https://memorialmerits.com/9-critical-documents-military-members-need-before-deployment-that-your-command-wont-mention/>

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SECTION 6: GOVERNMENT & SUPPORT RESOURCES

Military Legal Assistance

Base JAG/Legal Office: _____

Phone: _____

Hours: _____

Military OneSource: 800-342-9647 (24/7 support)

Website: www.militaryonesource.mil

Financial Counseling Resources

Military & Family Life Counseling (MFLC): Free, confidential counseling

Contact: Call Military OneSource at 800-342-9647

Personal Financial Management Program: Free financial counseling on base

Base Financial Counselor: _____

Phone: _____

Mental Health & Family Support Resources

FOR FAMILY MEMBERS BEING LEFT BEHIND:

Military OneSource Counseling: 800-342-9647 (free, confidential)

Deployment Support: 12 free counseling sessions per issue

Base Chaplain Services:

Chaplain Name: _____

Phone: _____

Family Support Center Programs:

- Deployment support groups
- Spouse employment assistance
- Child care resources
- Financial planning workshops

Base Family Support Center: _____

Phone: _____

Crisis Resources (24/7):

Veterans Crisis Line: 988 then press 1, or text 838255

Military OneSource: 800-342-9647

National Suicide Prevention Lifeline: 988

Crisis Text Line: Text HOME to 741741

VA Benefits & Services

VA Benefits Hotline: 800-827-1000

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SGLI Claims: 800-419-1473

Burial Benefits: www.va.gov/burials-memorials/

Nearest VA Office: www.va.gov/find-locations

Casualty Assistance

Branch-Specific Casualty Assistance:

- • Army: www.army.mil/myfamily
- • Navy: www.navy.mil/navy-casualty
- • Air Force: www.afpc.af.mil/casualty
- • Marine Corps: www.mcieast.marines.mil/casualty
- • Coast Guard: www.dcms.uscg.mil/casualty
- • Space Force: www.spaceforce.mil

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SECTION 7: FAMILY BRIEFING CHECKLIST

Before You Deploy: Review ALL of This With Your POA Holder/Family

- ☐ Walked through this entire document together
- ☐ Showed POA holder where all original documents are stored
- ☐ Demonstrated how to access password manager
- ☐ Reviewed all bank account locations and access methods
- ☐ Explained bill payment system and automatic payments
- ☐ Showed where vehicle titles and property deeds are kept
- ☐ Gave POA holder list of all insurance policies with contact numbers
- ☐ Explained difference between Page 2, SGLI, and DEERS
- ☐ Discussed funeral and burial wishes openly
- ☐ Showed location of legacy letters and explained when to open them
- ☐ Gave POA holder contact information for JAG, base chaplain, and family support
- ☐ Connected family with mental health resources and support groups
- ☐ Explained who to call first if something happens (Casualty Assistance Officer will contact them)
- ☐ Gave POA holder a complete copy of this checklist

Date Family Briefing Completed: _____

Family Members Present: _____

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FINAL PRE-DEPLOYMENT VERIFICATION

72 Hours Before Departure - Final Checks:

- ☐ All documents completed and properly executed
- ☐ Physical copies in deployment folder
- ☐ POA holder has complete copy of everything
- ☐ Page 2, SGLI, and DEERS all verified to match
- ☐ Digital access instructions complete and tested
- ☐ Automatic bill payments set up
- ☐ Family support resources shared with family
- ☐ Legacy letters written and stored
- ☐ Family knows where everything is and how to access it
- ☐ Command has updated contact information for next of kin

YOU'RE PREPARED

By completing this checklist, you've done something most service members never do: you've truly prepared your family for every possibility. Not just the minimum requirements your command checks, but comprehensive protection that covers all the gaps.

Your family knows where everything is. They can access what they need. They understand your wishes. And most importantly, they're not alone.

That's the best gift you can give them before you deploy.

Come home safe.

For additional resources, visit MemorialMerits.com

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