



# When the spouse of a retired letter carrier dies...

**OPM needs to be informed when the spouse of a retired letter carrier dies in order to restore the annuity to the full life rate and change health benefits coverage to single enrollment.**

**Fill out the form below and mail it with a copy of the death certificate and appropriate forms\* to:**

Office of Personnel Management  
Retirement Operations Center  
Boyers, PA 16017  
Attn: "Y" Adjustment

To Whom It May Concern:

My spouse (wife/husband), \_\_\_\_\_ passed away on \_\_\_\_\_ .  
*Enclosed is the death certificate.*

Please restore my annuity to the full life rate and change my health benefits coverage to single enrollment.

I also want to: *\*Call the NALC retirement department to obtain forms*

- Change beneficiary: Federal Employees' Group Life Insurance, SF 2823
- Change beneficiary: Civil Service Retirement System, SF 2808
- Change beneficiary: Federal Employees' Retirement System, SF 3102
- Claim Option C: Family Life Insurance, Federal Employees' Group Life Insurance, FE6-DEP
- Change my direct deposit information as follows:

New routing number \_\_\_\_\_

New account number \_\_\_\_\_

Name of Financial Institution \_\_\_\_\_

Address of Financial Institution \_\_\_\_\_

Retiree's name (please print): \_\_\_\_\_

Address: \_\_\_\_\_

Home phone: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

CSA: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Retiree's signature \_\_\_\_\_ Date \_\_\_\_\_

## For the Record

Deceased retired letter carrier's full name:

\_\_\_\_\_

Date of birth: \_\_\_\_\_

Social Security number: \_\_\_\_\_

CSA (claim) number: \_\_\_\_\_

Date of death: \_\_\_\_\_

### ABOUT THE SURVIVOR:

Survivor's name:

\_\_\_\_\_

Relationship to deceased: \_\_\_\_\_

Social Security number: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

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

Minor/Disabled/Student Child(ren):

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

Date of birth: \_\_\_\_\_

## National Association of Letter Carriers



# When a retired letter carrier dies...

Step-by-step instructions for survivors to ensure the continuation of benefits



**The NALC Retirement Department provides advice and assistance about retirement issues to active and retired letter carriers. But this support does not end when the letter carrier dies. NALC understands that dealing with matters after someone dies is a necessary task, but often one which is hard for the bereaved to cope with. The Retirement Department stands ready to help spouses and other survivors through the steps they must take to obtain survivor benefits.**

**This leaflet details the agencies and institutions that must be notified in order for survivors to receive retirement benefits. Before you start, please fill out the information on the back cover, because you will need to provide it to various agencies.**

- 1 Notify the U.S. Office of Personnel Management (OPM):**
- >> By writing to OPM, Retirement Operations Center, Boyers, PA 16017
  - >> Or by phoning OPM toll-free at 888-767-6738.

**Or, for quicker action, by providing the required information to NALC's Retirement Department:**

- >> By writing the NALC Director of Retired Members, 100 Indiana Ave. NW, Washington, DC 20001-2144
- >> Or by phoning 202-393-4695 during business hours
- >> Or by calling toll-free 800-424-5186 only on Monday, Wednesday, or Thursday, 10–noon and 2–4 p.m. (Eastern time).

NALC will alert OPM so that survivor benefits will commence as quickly as possible, and will send you the application for death benefits under the retirement system, and the claim for death benefits under the Federal Employees' Group Life Insurance Program.

- 2** Return any uncashed annuity checks to the address on the accompanying Treasury Department envelope. If payments are being deposited through Electronic Funds Transfer directly to a bank or other financial institution, contact them with the retiree's date of death and advise them to return any future payments to the Treasury Department.
- 3** Obtain enough death certificates for your needs from the mortuary (they may suggest how many).
- 4** Notify the retired carrier's NALC branch.
- 5** If the retiree was a veteran, notify the Veterans' Administration local office and/or the commanding officer of the local military installation.
- 6** Notify the retiree's bank or other financial institutions.
- 7** Call the local office of the Social Security Administration or toll-free 800-772-1213. Notify insurance companies (life, health, home, automobile, etc.).

- 8** If the retiree had a policy with NALC's Mutual Benefit Association, write to 100 Indiana Ave. NW, Room 510, Washington, DC 20001-2144 or call 202-638-4318. If the retiree belonged to the NALC Health Benefit Plan, write 20547 Waverly Court, Ashburn, VA 20149 or call 888-636-6252.
- (Note: Health benefit coverage for a surviving spouse and dependent children continues automatically if retiree had family coverage at time of death and if a monthly survivor annuity is payable.)

- 9** To start, stop or change monthly federal or state income tax withholding or request a duplicate 1099R, call 1-888-767-6738. You will need the retiree's CSA number and the last four digits of the Social Security number.

- 10** If the retiree participated in the Thrift Savings Plan, contact for Death Benefits Claims (only):
- Fax Number: (703) 592-0170
  - Mailing Address: TSP Death Benefits Processing Unit  
Fairfax Post Office  
DEDIS - P.O. Box 4450  
Fairfax, VA 22038-9998

or call the ThriftLine  
1-877-968-3778