



TWA Retired Pilots Association

Revised 1/1/2022

FLOWN WEST CHECKLIST IN THE EVENT OF DEATH OF A RETIREE, SPOUSE OR DEPENDENT

The following items are to enable you to find the answers for your estate upon the death of a TWA Retiree or Spouse: Make copies of all correspondence and log all phone calls by name, number and time.

Contact: American Airlines Benefits Service Center
1-888-860-6178 FAX 1-847-554-1884
PO Box 564103
Charlotte, NC 28256-4103

You will need the last four of the SS # and D.O.B.

You will need their full name, American or TWA payroll number. Did the deceased go to work for American after TWA? That's important. Date of death, cause of death, relationship, address phone number and names of surviving family members. Calling the previous numbers will get you directed to these new numbers also

MetLife, 800-440-6081 if needed, for proof of TWA Retiree Life Insurance.

Information needed: Deceased Employee's Name, Employee Number (AA Number) or TWA payroll number. Date of Death, Cause of Death, relationship of notifying party, Address and Phone number of notifying party. Names of surviving family members, Marriage date (if caller is surviving spouse). AA Benefits Center will provide important information concerning any benefits that may be provided. They will also send a detailed information package.

Medicare: Forms for Medicare should be at a hospital or Doctor's office.

Funeral plans: It is desirable that a person or family member have funeral plans ahead of time. These plans should be in writing and members of the family should know where they are located.

Death Certificate: Several official copies should be made, at least 12.

Will/Trust: General knowledge of the contents of either the Will or Trust should be known or easily referenced. It is important to know the Executor or Trustee for the documents. Legal procedures for the Will/Trust need to be followed. Using a Trust/Estate Attorney is the safest route for these procedures. Legal advice will confirm if the Will/Trust needs to be probated or not.

Internal Revenue Service: An accountant or tax attorney should be contacted to determine the liability of taxes due on the estate for both federal and state. The laws are constantly changing and the allowed deductions and exemptions vary from year to year and state to state. Each state has its own laws and procedures. Ownership in several states may require legal advice in those states. NOTE: Any action of a legal nature should be referred to your attorney.



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Retirement Pension Annuity and TWA DAP (401K).

- Contact the Pension Benefit Guarantee Corporation (**PBGC**) at **1-800-400-7242**
- **TWA DAP 401(k):** Contact EMPOWER (Great West Life and Annuity Ins. Co.) at **844-861-4327**, or Directed Account Plan Executive Director, *Michelle Silberberg* at **314-739-7373**

Stocks and Bonds: It may become necessary to liquidate stocks or other assets so bills can be paid. Check for ownership and survival succession. Your broker should be notified upon death. Proper forms should be available to your broker or banker to release funds.

Veterans Administration: Check with the VA for benefits such as Life Insurance if you are the family of a veteran. Information can be found under US Government in your phone book to obtain a Service Officer to render assistance. This can be American Legion, Disabled American Vets, State Office of Vet Services, AMVETS, VVA, VA etc. These individuals are the advocates for the veterans and can assist navigating the VA process.

State Veteran's Benefits:

Everyone knows about the federal benefits available to veterans, but did you know many states also offer great benefits to their veterans? This is a handy summary of the benefits each state and territory offers. Each summary page also has a link directly to the specific State Department of Veterans Affairs. [Click here for State Veteran's Benefits.](#)

Military Retirement: If the veteran was drawing military retirement they should contact the military service paying the retirement. If they are obtaining and receiving disability compensation from the Veterans Administration, they should contact the Service Officer or the VA Regional Office at 1-800-827-1000 and provide first notice of death.

FOLLOWING IS A LIST OF ITEMS YOU MAY WANT TO CHECK OR HAVE CHECKED BY YOUR ATTORNEY OR TAX ACCOUNTANT:

Social Security: Notify the Social Security office for possible death benefits. You may need to return the last Social Security check or have your bank return it if you are using direct deposit. Social Security Administration: (800) 772-1213. Have the Social Security Number available? A one-time payment of \$255 can be made only to a spouse or child if they meet certain requirements. Survivors must apply for this payment within two years of the date of death.

Request Your Military Service Records Online, by Mail, or by Fax

(Includes DD 214/Separation Documents, Personnel Records, and/or Medical Records

<http://www.archives.gov/veterans/military-service-records/>



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Burial and Plot Internment Allowance is available from the Veterans Administration. Survivors should contact the Service Officer or the VA Regional at 1-800-827-1000 and provide first notice of death. http://www.cem.va.gov/burial_benefits/

Membership Organizations: Check ALL memberships such as ELKS, American Legion, Moose, VFW, ALPA, Shrine, etc., for possible death benefits. Check online as each organization has a web site. It may be .Org or .Com, i.e., <http://www.ALPA.org>. For TWA Retired Pilot's Association Members, contact the Flown West Editor:

Captain Bob Willcutts
webmaster@tarpa.com

Certificates of Deposits: (CD's), Savings Bonds, Money Market Funds: Check for survival benefits, survival succession and survival ownership.

Bank Savings, Checking Accounts, and Credit Cards: Check for ownership and joint ownerships or other signatories.

Automobile Titles, Home Deeds or Deed of Trusts, Mortgages or Loans: Check for ownership and survival succession and payoff information.

Automobile Loans, Home Mortgages, and Outstanding Loans: Check to see if they are covered by insurance. Check for procedure to change ownership.

Other Items for Consideration are: The location of Birth and Marriage Certificates, Living Will, Power(s) of Attorney, Divorce Papers, Military DD 214, Veterans Benefits Papers, Deed or House Mortgage, Bank Statements, Investment and Broker Portfolios, Partnership or LLC's, Credit Union papers, Life, Health, Home and Auto Insurance, Past Tax Statements and any other items you consider important.

These are some of the many questions and situations that may arise upon the death of a spouse or family member. It is NOT the intent of the TWA Retired Pilots Association or any other TWA Retiree group to act as legal counsel or provide legal opinions. The above information is for your consideration and planning, to ease the burden on your survivors.

If you use a computer: it would be a good idea to make a list of all your passwords to give to a trusted family member. But DO NOT transmit them electronically, especially by email. Even typing them as a list on the computer can be risky. This is one time to make use of pen and paper.



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I know using this check list will be during one of the most trying times of your life and you have my sincere condolences in advance.

Captain Bill Kirschner, TWA Ret. Editor TWA TOPICS, Past President

FLOWN WEST REPORTING PROCEDURE

Revised January 1, 2022



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REVISED AND UPDATED: January 1, 2022

American Airlines Benefits Center: 1-888-860-6178



The procedure for reporting a pilot's death is for survivors to call American Airlines Benefits Service Center 1-888-860-6178. The primary reason for that is to determine eligibility for Insurance benefits.

They will want complete information on **BOTH** the **deceased** and the **beneficiary**, including:

- Full names
- Address's
- Social Security numbers

The following information will also need to be included:

- Date and cause of death
- Beneficiaries' relationship to the deceased
- Funeral home information

Beneficiary will later have to submit a certified copy of the death certificate. Initial contact must be by telephone. American Airlines wants voice contact. Have the information at hand before the call. If beneficiary is unable to call, and if someone else calls for them, beneficiary must be on hand.

Send Death Notifications to:

Capt. Bob Willcutts
Webmaster@tarpa.com