

SURVIVORS' CHECKLIST

This booklet has been prepared for you by the Air Line Pilots Association's Retirement and Insurance Department and the Delta MEC Retirement and Insurance Committee as an aid to you and your family in the event of your death.

After completing the information suggested in this booklet, review and update it at least once every three years. You should also update this information *any time* your family or financial situation changes substantially, or when a new Pilot Working Agreement is negotiated with Delta.

Place this booklet wherever you keep your other important papers, and make sure your spouse or next-of-kin is aware of its location.

If you have not already done so, we strongly recommend that you draw up a will. If you have one, determine whether it needs updating due to a change in family status, births, deaths, divorce or remarriage.



PERSONAL HISTORY SHEET

Name: _____ Date of birth: _____

Address: _____ Telephone #: _____

Social Security #: _____ Military #: _____

Driver's license # _____ State: _____

Blood type: _____

Next-of-kin's name, address, & phone #: _____

Physician's name, address, & phone #: _____

Dentist's name, address, & phone #: _____

Attorney's name, address, & phone #: _____

Accountant's name, address, & phone #: _____

Insurance agent's name, address, & phone #: _____

My will is filed with: _____

_____ Dated: _____

I have signed a Uniform Anatomical Gift Act form ☐ Yes ☐ No

Location of: Car title: _____

Old tax returns _____

Birth certificate(s): _____

Marriage certificate: _____

Military records: _____

Social Security card: _____

Insurance policies: _____

Cemetery plot: _____

Bank Accounts: Checking account #: _____

Savings account #: _____

Other documents: _____

Whom to see and what to do in the event of my death...

Record any personal instructions for your spouse or next-of-kin for arrangements you want made in the event of your death.

- Delta's Employee Service Center number is 800-MY-DELTA.
- Also, contact the MEC office at 800-USA-ALPA for assistance.

In the event of my death, please contact the offices of the Delta Master Executive Council (MEC) at 1-800-USA-ALPA; a pilot will be assigned to help you.

POWERS OF ATTORNEY

List any and all types of general or limited powers of attorney that you may have executed. Note the date, to whom given, valid until what date or action.

SAFE DEPOSIT BOX

Location: _____
Box #: _____
Holder's name _____
Others with access: _____
Number of keys: _____
Location of keys _____

INVENTORY

A current inventory of your assets will be very useful to your beneficiaries, executor, or legal representative in locating all of the assets of your estate. The following is a partial list of different types of investments that may be helpful in completing your inventory:

Cash	Residence
Savings	Vacation home
Money market and mutual funds	Recreational property
Certificates of deposit	Rental real estate
Corporate bonds	Commercial real estate
Municipal bonds	Undeveloped land
Common or preferred stocks	Real estate partnership
Notes & mortgages receivable	Agriculture
Energy income partnerships	Equipment leases
Research & development	Sheltered partnerships
Commodities/options	Bank acceptances
Treasury notes	Life insurance
Treasury bills	Annuities
Business interests	IRAs, Traditional/Roth
Art, antiques, stamps, coins	Keoghs
Gold, silver, gems	Corporate qualified plans
Valuable personal property (furs, jewels, art)	

ASSETS

VALUE

LOCATION

DEBTS AND LIABILITIES

In addition to locating and distributing your assets, your executor or legal representative will be responsible for settling your debts. List all of your current debts and liabilities (*do not include debts that are payable within 30 days*).

CREDITOR	ADDRESS	DEBT FOR

Credit Cards

Issued by: _____	#: _____
Issued by: _____	#: _____
Issued by: _____	#: _____
Issued by: _____	#: _____
Issued by: _____	#: _____
Issued by: _____	#: _____
Issued by: _____	#: _____
Issued by: _____	#: _____
Issued by: _____	#: _____
Issued by: _____	#: _____
Issued by: _____	#: _____
Issued by: _____	#: _____
Issued by: _____	#: _____
Issued by: _____	#: _____

COMPANY-PROVIDED BENEFITS

In the space provided below, briefly describe the negotiated benefits provided by your Company. A good source for this information is the Summary Plan Descriptions, which you received from your Company, or contact a member of your MEC Retirement & Insurance Committee. (Contact information is provided earlier in this booklet under each benefit)

Company Paid life insurance:

Optional Group life insurance (if applicable):

Defined Benefit Retirement Plan Survivor Annuity:

Accidental death and dismemberment:

Company contact (name and phone number):

ALPA-Provided Death Benefits

Group Term Life, Ten Year Level Term Life, and Accidental Death & Dismemberment

As an ALPA member, you are eligible to enroll in several ALPA benefit programs, including a member life insurance program through New York Life Insurance Company, and an accidental death and dismemberment program. If you elect to be covered, you should be sure to include the type and amount of coverage on your assets and liability form in this booklet. In the event of your death, your beneficiary should contact:

Air Line Pilots Association
Membership Services Department
535 Herndon Parkway
Herndon, VA 20170
888 FLY ALPA
888 359-2572

Government-Provided Death and Survivor Benefits

Social Security Survivor Benefits

Your surviving spouse and dependent children may be entitled to Social Security survivor benefits. Contact www.ssa.gov to determine who may qualify.

Social Security Burial Benefits

Social Security pays a lump-sum death benefit of \$255 in addition to monthly survivor benefits.

Veteran's Benefits

Veterans discharged under conditions other than dishonorable are entitled to burial in a national cemetery or to an allowance for a headstone or grave marker. Dependent spouses and survivors may be entitled to additional benefits and should contact the nearest regional office of the Veterans Administration for additional information.

Worker's Compensation

Worker's Compensation death benefits vary from state to state. Contact the Worker's Compensation Board of your state of residence for more information.

Prepared by ALPA's Retirement & Insurance Department and the Delta MEC Retirement & Insurance Committee



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