



NOTES

A series of horizontal lines for writing notes.



This handy checklist can help you tie up any "loose ends" prior to your deployment. We've also provided worksheets where you can record important information. For a complete checklist, refer to the official deployment packet provided by your base.

LEGAL

- Write or update wills.
- Establish Power of Attorney.

FINANCIAL

- Record credit union or bank information.
  - Provide checking and savings account numbers, along with Web access ID and password (see "Important Account Numbers" worksheet).
  - Record credit card numbers and card companies' phone numbers (see "Important Account Numbers" worksheet).
- Speak with your credit union or bank.
  - Notify them that debit/credit cards will be used overseas.
  - Ask to be put on Deployment Alert, which will help us serve you better.
  - Set up Direct Deposit.
  - Set up joint accounts, if necessary.
  - Set up an overdraft protection plan like Navy Federal's Optional Overdraft Protection Service (OOPS).
  - Set up emergency savings accounts.
  - Have outstanding loans? Navy Federal offers Payment Protection Plans (P3) and Guaranteed Asset Protection (GAP), which can help with payments should something unexpected occur.
- Inform creditors of your deployment.
  - Notify credit card companies to expect overseas use of your card.
  - Ask creditors if they offer deployment benefits.
  - Inquire about the Servicemembers Civil Relief Act.
- Review current and future investment strategies.
  - Update beneficiaries.
  - Record account number(s) and contact information (see "Important Account Numbers" worksheet).
  - Enroll in the Thrift Savings Plan (tsp.gov) or speak with a Navy Federal Financial Group Advisor (1-877-221-8108).
- Sign LES release, allowing your spouse access.
- Set up a budget for home and deployment expenses (see "Household Budget" worksheet).
  - List loan due dates, addresses, phone numbers, ID, and password (see "Important Account Numbers" worksheet).
  - List utility due dates, addresses, phone numbers, ID, and password (see "Important Account Numbers" worksheet).
  - Establish who will manage the budget and how withdrawals and expenses will be recorded.



- Simplify life by setting up recurring payments on Navy Federal's free Web Bill Pay—all you need is your Account Access number, ID, and password.

**HEALTH CARE**

- Confirm TRICARE status.
  - Ensure family members are enrolled and information is updated and accurate.
  - Provide spouse with medical cards.
- Locate and record important medical information.
  - List prescriptions, including dosages and frequencies.
  - Gather vaccination and eye prescription records.
  - Sign HIPPA release form.
  - Record names, addresses, and phone numbers of doctors, dentists, and pharmacies (see "Helpful Resources" worksheet).



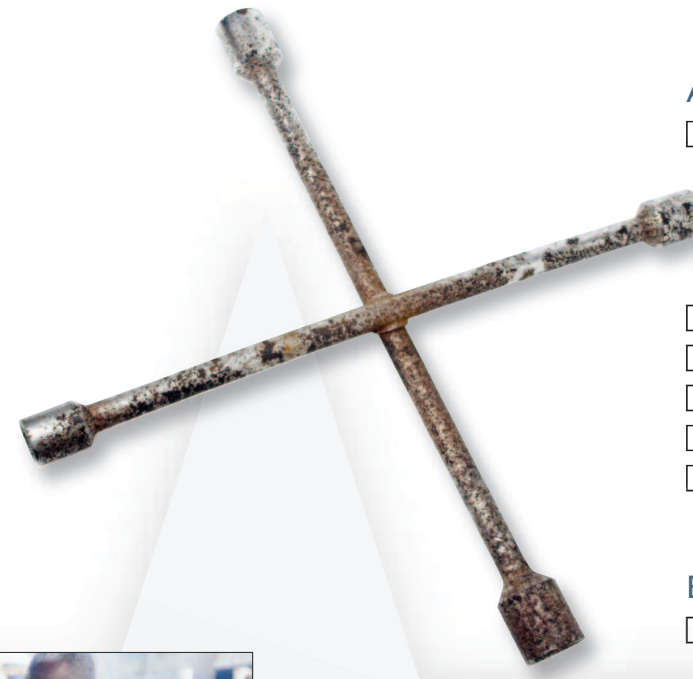
**LIFE INSURANCE**

- Evaluate your life insurance needs.
  - Update beneficiaries.
  - Record policy number and contact information (see "Important Account Numbers" worksheet).
  - Need life insurance? Speak with a Navy Federal Financial Group Advisor (1-877-221-8108).<sup>1</sup>



**HOME**

- Review homeowners insurance policies.
  - Record company and agent names along with phone and account numbers (see "Important Account Numbers" worksheet).
  - As a member of Navy Federal, you may qualify to get special discounts from GEICO<sup>2</sup>—simply call 1-877-609-5669.
- Make and safely store spare keys for house, storage sheds, safes, etc.
- Record and safely store computer passwords (see "Important Account Numbers" worksheet).
- Ensure smoke detectors are working and install new batteries.
- Replace filters on heating and air conditioning units.
- Record contact information of trusted repair services (see "Helpful Resources" worksheet).



**AUTO**

- Review auto insurance policies.
  - Record company and agent names along with phone and account numbers (see "Important Account Numbers" worksheet).
  - As a member of Navy Federal, you may qualify for special discounts from GEICO<sup>3</sup>—simply call 1-877-609-5669.
- Make and safely store spare keys for all vehicles.
- Sign up for roadside assistance.
- Prepare a roadside emergency kit.
- Create a schedule for oil changes and tune-ups.
- Record contact information of trusted mechanics and dealers (see "Helpful Resources" worksheet).

**EMERGENCY PREPAREDNESS**

- Assemble a 72-hour emergency preparedness kit. Visit [redcross.org](http://redcross.org) for a comprehensive list of items to include.
- Establish and practice a home exit plan.
  - Compile an emergency contact list (see "Emergency Phone Numbers" worksheet).
  - Consider establishing an off-site friend or relative to contact should you and your servicemember be unable to reach each other.

**FAMILY**

- Record and safely store computer passwords (see "Important Account Numbers" worksheet).
- Notify your child's school or daycare provider that a family member is being deployed.
- Take plenty of photos before and during the servicemember's deployment.
- Discuss the separation, while sharing feelings and asking questions.
- Make connection points.
  - Record bedtime stories or wake-up routines to play to your children.
  - Make photo books for both the servicemember and those at home.
  - Make family videos.
  - Install video conference programs like Skype if possible.
  - Post a map of and learn about the deployment location. Consider cooking traditional meals or learning to say "hello" and "goodbye" in the native tongue.
- Scan and e-mail handmade cards or other art creations.
- Involve everyone in the letter-writing or e-mailing process.
- Create a CD or playlist that contains meaningful or memorable songs.



<sup>1</sup>Insurance sold through licensed Insurance Representatives of various companies. Products offered through Navy Federal Brokerage Services, LLC (NFBS) and Navy Federal Asset Management, LLC (NFAM) are not NCUA/NCUSIF or otherwise federally insured, are not guaranteed or obligations of the credit union, are not offered, recommended, sanctioned, or encouraged by the Federal Government, and may involve investment risk, including possible loss of principal. Products may be offered by an employee who serves both functions of accepting member deposits and selling nondeposit investment products. Representatives registered with NFBS and NFAM (Members FINRA/SIPC). 1-877-221-8108. <sup>2</sup>Homeowners coverage is written through non-affiliated insurance companies and is secured through the GEICO Insurance Agency, Inc. <sup>3</sup>Some discounts, coverages, payment plans, and features are not available in all states or all GEICO companies.



Need a little help getting organized? Simply cut out these labels and use them with your hanging file folders or other organizational system.

**LEGAL**

- Power of Attorney
- Wills

**FINANCIAL**

- Account Numbers
- Credit Union or Bank Passwords
- Receipts
- Tax Records

**HEALTH CARE**

- Eye Care Records
- Medical Records
- Prescription Records
- Vaccination Records

**HOME**

- Computer Passwords
- Helpful Resources
- Home Repair Records
- Household Budget
- Important Account Numbers
- Mortgage/Renter's Agreement
- Warranties

**AUTO**

- Auto Care Records
- Auto Loan
- Title

**INSURANCE**

- Auto Insurance
- Health Insurance
- Homeowners/Renters Insurance
- Life Insurance

**INVESTMENTS**

- Financial Advisor
- Retirement Accounts

**EMERGENCY PREPAREDNESS**

- Emergency Data Card (copy)
- Emergency Phone Numbers

**FAMILY**

- Birth Certificates
- Driver's License (copy)
- Marriage Certificate
- Military Orders
- Passports
- Social Security Cards
- Miscellaneous

Fill in the following for special labels.


Take a few minutes to record important bank account information. Then give a copy to your spouse or Power of Attorney, and keep one for yourself. Remember to store this in a safe, secure location.

<b>Navy Federal Credit Union</b>	
Checking Account #:	_____
Savings Account #:	_____
Account Access #:	_____
User ID:	_____
Password:	_____

For questions, or to find a branch or ATM near you, visit our website at [navyfederal.org](http://navyfederal.org), or call **888-842-6328**. Overseas, call collect at 703-255-8837.



# EMERGENCY CONTACTS



Take a few minutes to record important emergency phone numbers. Then give a copy to your spouse or Power of Attorney, and keep one for yourself. Remember to store this in an accessible location.

Servicemember's Phone Number: \_\_\_\_\_  
 Servicemember's Overseas Address: \_\_\_\_\_  
 Servicemember's Emergency Contact: \_\_\_\_\_  
 E-mail Address: \_\_\_\_\_  
 Emergency: 9-1-1  
 Police: \_\_\_\_\_  
 Fire Department: \_\_\_\_\_  
 Hospital: \_\_\_\_\_

Auto Insurance: \_\_\_\_\_  
 Health Insurance: \_\_\_\_\_  
 Homeowners Insurance: \_\_\_\_\_  
 Life Insurance: \_\_\_\_\_

Doctor: \_\_\_\_\_  
 Pediatrician: \_\_\_\_\_  
 Optometrist: \_\_\_\_\_  
 Dentist: \_\_\_\_\_

School: \_\_\_\_\_  
 Daycare: \_\_\_\_\_

American Red Cross: \_\_\_\_\_  
 Pastor/Chaplain/Rabbi: \_\_\_\_\_  
 Base Office: \_\_\_\_\_  
 Support Group: \_\_\_\_\_

Veterinarian: \_\_\_\_\_



### FAMILY

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

### NEIGHBORS

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

### OTHER

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



Take a few minutes to record a list of go-to people. Then give a copy to your spouse or Power of Attorney, and keep one for yourself. Remember to store this in an accessible location.

**LEGAL**

Lawyer: \_\_\_\_\_

**FINANCIAL**

Credit Union or Bank: \_\_\_\_\_

Life Insurance Agent: \_\_\_\_\_

Financial Advisor: \_\_\_\_\_



**HEALTH CARE**

Health Insurance Company: \_\_\_\_\_

Doctor: \_\_\_\_\_

Pediatrician: \_\_\_\_\_

Pharmacy: \_\_\_\_\_

Dentist: \_\_\_\_\_

Optometrist: \_\_\_\_\_

**HOME**

Homeowners Insurance Agent: \_\_\_\_\_

Home Repair: \_\_\_\_\_

Plumber: \_\_\_\_\_

Electrician: \_\_\_\_\_

Heating/Air Conditioning Repair: \_\_\_\_\_

Home Security: \_\_\_\_\_

Cable Service: \_\_\_\_\_

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

Computer Repair: \_\_\_\_\_



**AUTO**

Auto Insurance Agent: \_\_\_\_\_

Auto Dealer: \_\_\_\_\_

Auto Mechanic: \_\_\_\_\_



NOTES

Lined area for notes with horizontal lines.



Take a few minutes to record important account numbers and passwords. Then give a copy to your spouse or Power of Attorney, and keep one for yourself. Remember to store this in a safe, secure location.

Personal Computer User ID: \_\_\_\_\_ Password: \_\_\_\_\_
E-mail Access User ID: \_\_\_\_\_ Password: \_\_\_\_\_
Voicemail Access Password: \_\_\_\_\_
Safe Combination: \_\_\_\_\_

FINANCIAL

Credit Union or Bank Information

Website/Phone Number: \_\_\_\_\_
Account Access Number: \_\_\_\_\_
User ID: \_\_\_\_\_
Password: \_\_\_\_\_
Checking Account Number: \_\_\_\_\_
Savings Account Number: \_\_\_\_\_
Credit Card Number: \_\_\_\_\_

Credit Card

Company: \_\_\_\_\_
Phone Number: \_\_\_\_\_
Account Number: \_\_\_\_\_
User ID: \_\_\_\_\_
Password: \_\_\_\_\_
Due Date: \_\_\_\_\_



HOME

Mortgage/Rent

Company/Landlord: \_\_\_\_\_
Phone Number: \_\_\_\_\_
Account Number: \_\_\_\_\_
User ID: \_\_\_\_\_
Password: \_\_\_\_\_
Due Date: \_\_\_\_\_



**Electric/Gas**

Company: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_  
 User ID: \_\_\_\_\_  
 Password: \_\_\_\_\_  
 Due Date: \_\_\_\_\_



**Water/Trash**

Company: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_  
 User ID: \_\_\_\_\_  
 Password: \_\_\_\_\_  
 Due Date: \_\_\_\_\_



**Homeowners/Renters Insurance**

Company: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_  
 User ID: \_\_\_\_\_  
 Password: \_\_\_\_\_  
 Due Date: \_\_\_\_\_

**Phone/Cable/Internet**

Company: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_  
 User ID: \_\_\_\_\_  
 Password: \_\_\_\_\_  
 Due Date: \_\_\_\_\_



**Life Insurance**

Company/Agent: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_  
 User ID: \_\_\_\_\_  
 Password: \_\_\_\_\_  
 Due Date: \_\_\_\_\_

**INVESTMENTS and RETIREMENT**

**Investments**

Company/Agent: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_  
 User ID: \_\_\_\_\_  
 Password: \_\_\_\_\_  
 Due Date: \_\_\_\_\_

**AUTO**

**Auto Loan**

Company: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_  
 User ID: \_\_\_\_\_  
 Password: \_\_\_\_\_  
 Due Date: \_\_\_\_\_

**IRA/Retirement**

Company/Agent: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_  
 User ID: \_\_\_\_\_  
 Password: \_\_\_\_\_  
 Due Date: \_\_\_\_\_



**INSURANCE**

**Auto Insurance**

Company/Agent: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_  
 User ID: \_\_\_\_\_  
 Password: \_\_\_\_\_  
 Due Date: \_\_\_\_\_

Should you have questions about your Navy Federal accounts or the services we offer, visit [navyfederal.org](http://navyfederal.org), or call us at **888-842-6328** (if overseas, call collect at 703-255-8837).

HOUSEHOLD BUDGET

Month/Year: \_\_\_\_\_

	Budgeted Amount	Week 1 (actual)	Week 2 (actual)	Week 3 (actual)	Week 4 (actual)	Week 5 (actual)	Amount Spent
<b>Income</b>							
Net Income							
Spouse's Net Income							
Other Income							
<b>Total Income</b>							
<b>Expenses</b>							
<b>Home</b>							
Rent/Mortgage							
Insurance							
Other Living Expenses							
<b>Utilities</b>							
Electric/Gas							
Water/Trash							
Phone/Cable/Internet							
Other							
<b>Auto</b>							
Loan Payment							
Gas/Maintenance							
Insurance							
Other							
<b>Insurance</b>							
Life							
Health							
Other							



HOUSEHOLD BUDGET

	Budgeted Amount	Week 1 (actual)	Week 2 (actual)	Week 3 (actual)	Week 4 (actual)	Week 5 (actual)	Amount Spent
<b>Expenses (continued)</b>							
<b>Financial Commitments</b>							
IRA/Retirement							
Stocks/Bonds/Mutual Funds							
Savings/Money Market/Bonds							
Other							
<b>Family</b>							
Food							
Clothing							
Entertainment/Recreation							
School/Daycare							
Child's Activities							
Child Support/Alimony							
Tuition							
Educational Savings							
<b>Other</b>							
Credit Cards							
Store Credit Cards							
Star Card							
Consolidation Loan							
Personal Loan							
Student Loan							
Monthly Dues							
Miscellaneous Expenses							
Other							
<b>Total Expenses</b>							

