

**ABOUT THE RETIRED LETTER CARRIER:**

Retired letter carrier's full name: \_\_\_\_\_

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

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

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

Federal Employees' Group Life Insurance

Yes \_\_\_ No \_\_\_

If yes, amount: \$ \_\_\_\_\_

If yes, beneficiary: \_\_\_\_\_

**ABOUT THE SURVIVOR:**

Survivor's full name: \_\_\_\_\_

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

\*If spouse, is spouse entitled to a survivor annuity?

Yes \_\_\_ No \_\_\_

If yes, enter monthly amount: \$ \_\_\_\_\_

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

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

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

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

Email address, if applicable: \_\_\_\_\_

**Minor/Disabled/Student Children:**

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

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

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

**When a spouse predeceases**

a retired letter carrier, the retired letter carrier's annuity will be restored to the full life rate; in other words, if the spouse of a retired letter carrier dies before the letter carrier dies, the reduction for survivor benefits, if any, discontinues.

Also, if the spouse was covered under the annuitant's FEHB health insurance, enrollment will change to self-only, if applicable.

These changes are made by the OPM upon proper notification. Members can call the NALC Retirement Department for guidance. The NALC will also provide the appropriate form letter and Designation of Beneficiary forms for the annuitant to submit to OPM. Call one of the NALC numbers at the bottom of this page.

**National Association of Letter Carriers Retirement Department**

Toll-free 800-424-5186 Monday, Wednesday and Thursday from 10-12:00 and 2-4:00, Eastern Standard Time.

The NALC Retirement Department can also be reached Monday – Friday from 9-4:30 at 202-393-4695; however, long distance charges may apply.



**When a retired letter carrier dies...**

Step-by-step instructions for survivors to notify appropriate entities and apply for federal benefits such as survivor annuity, health and life insurance.

**The NALC Retirement Department provides advice and assistance to retired and active members regarding retirement issues. This support does not end when an NALC member dies. Guidance to spouses and other survivors is also provided. Please fill out the information on the back side of this brochure to have ready to provide when needed. The steps to be taken when a retired letter carrier dies are as follows:**

- 1** Notify the U.S. Office of Personnel Management (OPM). This can be done by phone, online or in writing and it is not necessary to have a death certificate to do so. How to report the death of a deceased annuitant to OPM:  
Visit <https://www.serviceline.opm.gov/> and click on "Report an Annuitant Death". This will link you to an online form to complete and submit or send an email to [retire@opm.gov](mailto:retire@opm.gov) and include the information pertaining to the annuitant and survivor(s) as on the reverse side of this brochure or call OPM at 888-767-6738.  
Once the death of an annuitant has been reported to OPM, the OPM will

stop payment of the monthly annuity and mail the applicable claim forms to the survivor(s).

In most cases, two forms will be included in the packet:

- Application for Death Benefits (death benefits include survivor benefits and/or any unpaid annuity balance) and
- Application for Federal Employees' Group Life Insurance (FEGLI)

The packet also includes pre-addressed return envelopes, which are color-coded pink and blue.

Calling OPM can sometimes take several attempts due to high call volumes. Callers may be on hold for 20 minutes or longer. The NALC Retirement Department staff is familiar with OPM and is well-versed in explaining OPM's processes. Upon request, the NALC will report the death of a retired member to OPM, or answer questions. Call one of the NALC numbers on the reverse.

- 2** Notify the bank where annuity payments are deposited, as well as any other of the retiree's financial institutions. Any annuity payments deposited after the date of death will be returned to OPM. Return any uncashed annuity checks to the address on the accompanying Treasury Department envelope.
- 3** Obtain enough death certificates for your needs from the mortuary.

- 4** Notify the retired letter carrier's NALC branch.

- 5** If the retiree was a veteran, notify the Veterans' Administration at 800-827-1000.

- 6** Call the Social Security Administration at 800-772-1213.

- 7** Notify insurance companies (life, health, home, automobile, etc.).

- 8** If the retiree had a policy with NALC's Mutual Benefit Association, call 202-638-4318 or write to MBA, 100 Indiana Ave. NW, Washington, DC 20001-2144.

- 9** If the retiree had health insurance through the NALC Health Benefit Plan or any other FEHB plan, the OPM will inform the health plan. When a spouse is entitled to survivor benefits, he or she will continue to receive health insurance through the FEHB as long as he or she was covered under their spouse's FEHB plan at the time of death. The health plan will automatically change to self only and be switched to the surviving spouse's name.

- 10** If the retiree participated in the Thrift Savings Plan, contact the TSP at 877-968-3778.