



AMC-APG LEGAL CENTER MOAA BRIEFING

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Objective:

REMINDER: Any information provided is for general informational purposes only and does not constitute legal advice for your specific situation.

- **Familiarize Potential Clients with Services available from DOD regarding Estate Planning, Financial Planning, and Survivor Services**
- **Provide Contact Information**
- **Some General Planning Principles to keep in mind**





Eligibility for Legal Assistance

- **Determined by Statute and Regulation**
 - Local offices have no discretion to make exceptions
- **Eligible clients include:**
 - **Active Duty Military, all branches**
 - **Retirees**
 - **Must be receiving retired pay (old “blue ID card holders”)**
 - **“Grey area” reserve retirees must wait until age 60**
 - **VA disability pay does not count**
 - **Medically retired receiving disability pay does count**
 - **Dependents + survivors of above**
 - **Misc. others such as:**
 - **Deploying Civilians for estate planning**
 - **FLIPL Civilian employee respondents**





Relevant Services Available

- General Financial Planning Advice
- Estate Planning Advice and Document Drafting
 - Wills
 - General POAs (Financial + Durable)
 - Medical Directives
- Probate Avoidance assistance
 - Beneficiary Designations
 - Bank Accounts, Car Titles, Life Insurance, Retirement Accounts
- Probate Process Assistance
 - Briefing on the probate process
 - Direction to the proper court
 - **No in court representation services**





Common Mistakes

- **No Plan at all**
 - **Everything goes through probate under the State Intestate Succession Law. If you don't have a will, Maryland wrote one for you.**
- **Wills out of date**
- **Beneficiary Designations not updated**
 - **Deceased persons named**
 - **Trustees for minors not named**
 - **Ex spouse collects life insurance (yes it happens)**
- **Family not briefed on the plan**
 - **Where's the will kept?**
 - **Medical agents not given guidance, what did he/she want?**
 - **Keep a war book with account #s, passwords, POC's etc.**





Who to Contact When a Soldier Passes

(List not exhaustive)

- **Army Casualty Assistance (ACA helps with all the rest of these)**
- **Army Legal Assistance**
- **Social Security**
- **DEERs**
- **TRICARE**
- **DFAS**
- **VA**
- **Survivor Outreach Services**
- **Survivor Benefit Plan**
- **Government Life Insurance (SGLI, VGLI, FEGLI)**
- **Office of Personnel Management (OPM)**





APG Points of Contact

- **Army Casualty Assistance**
 - **Ms. Marita Witherspoon**
 - **(410) 306-2308**
 - **marita.s.witherspoon.ctr@army.mil**

- **Army Legal Assistance**
 - **Mr. Kirk L. Knockett (Estate Planning)**
 - **(410) 278-1583**
 - **kirk.l.knockett.civ@army.mil**





QUESTIONS?

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