



## FINANCIAL PLANNING FOR DEPLOYMENT CHECKLIST

### Important Documents

- Do you have a will?
- Is your Record of Emergency Data (Page 2) current?
- Is the correct beneficiary listed on your SGLI and any other insurance?
- Do you need to leave Powers of Attorney with anyone?
- Will ID Cards/DEERS enrollment need to be updated?

### Financial Planning

- Do you have a written monthly spending plan for the deployment? (Get a Financial Planning Worksheet from your CPFC.)
- Sign up for the Saving Deposit Program (SDP).
- Do you plan to do your taxes while deployed? Do you have a Specific Power of Attorney?

*Does your spending plan include amounts for possible income changes such as:*

- Sea pay starting or stopping
- Family Separation Allowance (FSA)
- Promotion while deployed
- Reenlistment bonuses or any other special payments
- Tax-free earnings
- Combat Duty Pay

*Does the spending plan include amounts for:*

- Port visits
- Long distance phone calls

- Gift/souvenirs
- Savings for vacation after the deployment
- Are you enrolled in the Thrift Savings Plan (TSP)?

### Banking and Bills:

- Is your pay set up the way you want? (DDS to correct account(s), split pay, Eagle Cash Card, allotments, online banking, and automatic check drafts?)
- Do you have overdraft protection for your checking account?
- Will your debit/credit cards expire during your TAD assignment?
- How will you be making payments to creditors? Do they have your correct address?
- Are there any annual/quarterly expenses such as car or home insurance or tuition payments due while you are deployed? If so, when are they due and how will they be paid?
- If married, have you discussed who will be using which credit cards and set spending limits?
- If married, are you using joint or separate checking accounts? If joint, have you discussed how you will manage?

### Housing

- If planning to sublet your house or apartment did you do a credit check on potential tenants?
- Is your renter's/homeowner's insurance current and does it cover replacement costs?



\_\_\_ Do you have a plan for routine maintenance and lawn care?

### Vehicles

\_\_\_ Do you have a safe place to store your vehicle and/or someone to take care of it?

\_\_\_ Will insurance, tags, registration, inspection and/or base stickers expire while deployed?

\_\_\_ Is all routine maintenance complete?

### Communication

\_\_\_ Do you have a plan for making telephone calls?

\_\_\_ Have you discussed e-mail use?

\_\_\_ Have you discussed regular mail and care packages?

\_\_\_ Have you discussed emergency communication?

### Emergency Plans

\_\_\_ Do you have at least one month's pay saved in case of financial emergency?

\_\_\_ Do you need to consider signing a power of attorney?

\_\_\_ Does your family know your official mailing address, command name, and Social Security number?

\_\_\_ Does your family have the key spouse telephone number?

\_\_\_ Does your family know how to use the American Red Cross in case of an emergency and AFPAAS?

### Individual Augmentees (IA)

\_\_\_ Have you obtained a Government Travel Charge Card (GTC) or Advance Per Diem (if GTC cannot be issued)?

\_\_\_ Do you know how to contact the Center of Excellence (COE) to which you are assigned in the event that you have questions about pay and personnel issues?

\_\_\_ Are you aware of your IA assignment related entitlements and potential changes in pay?

\_\_\_ Do you know how to contact ECRC in the event that you need specific information on pay or entitlement issues?

\_\_\_ Have you secured transportation and lodging reservations through TMO to ensure full reimbursement?

\_\_\_ Do you know where to send and how to submit your travel claims and receipts?

\_\_\_ Do you know how to access and submit forms for reimbursement of miscellaneous expenses, (SF) 1164 and/or DD Form 2902?

*See your Personal Financial Manager for more information.*

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