



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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