

# U. S. Coast Guard



# Retiree Newsletter



Volume 2, Issue 2

April 1999

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## Certificates honor Cold War service

In accordance with Section 1084 of the FY98 National Defense Authorization Act, the Secretary of Defense has approved the awarding of the Cold War Recognition Certificate to all members of the

Agent for implementation and award of the Cold War Recognition Certificate.

The Personnel Service Support Division, Adjutant General Directorate of the U.S. Total Army Personnel Command is responsible

has established a website on the internet at: "[www.SDCW.army.mil.coldwar](http://www.SDCW.army.mil.coldwar)" which will contain the application and information on how to obtain and forward supporting documents to receive the Cold War Recognition Certificate if you are eligible.

Applications for the certificate will be accepted anytime after 5 April 1999.

At press time the application and details for obtaining the Cold War Recognition Certificate were not available, however, the information and application will be provided in your July 1999 Retiree Newsletter.



Example of certificate to be awarded to former and current members of Cold War service

uniformed services and qualified federal government civilian employees who faithfully served the United States during the Cold War era, from 2 September 1945 to 26 December 1991. 18 – 22 million former and current service members are eligible to receive the certificate in honor of the part they played in winning the Cold War.

The Department of the Army has been designated as the Executive

for the program.

The Army Personnel Command (PERSCOM)



# Alaska veterans of the U.S. Coast Guard

*The following article was submitted by LCDR Daniel E. Baumbaugh, USCG, Retired.*

The Bering Sea Patrol was born in 1867 when the Revenue Cutter "LINCOLN" was sent north following Alaska's purchase from Russia. At that time, there was only one light-house and scattered Russian settlements in the district. During its early years, the captains of the revenue cutters, and later the Coast Guard cutters, served as United States commissioners and were almost the only law in wide areas of the territory.

However, even before Alaska became a U.S. possession, men of the Revenue Cutter Service were sailing in Alaskan waters. Our history is replete with stories of their heroism and adventure, and their dedicated service under hazardous conditions and hardship.

In 1865, a Revenue Service cutter was in Alaska when the telegraph cable line to St. Petersburg (Sitka) was first planned. Although "LINCOLN" was the first American vessel to arrive in the territory after the purchase from Russia, it was the Revenue Cutter "CORWIN" that, in 1880, became the first United States vessel assigned to general

police work in the Bering Sea.

The first Bering Sea Patrol Force, made up mostly of revenue cutters, sailed from Port Townsend, Washington in 1892 under the command of Robley D. Evans of the U.S. Navy. In addition to the flagship and the sailing cruiser "YORKTOWN", the squadron included "ADAMS", "MOHICAN", "RUSH", "RANGER", "CORWIN", "BEAR" and "ALBATROSS", plus two British ships, "H.M.S. MELPOMENE" and "H.M.S. DAPHNE".

For decades following that first force, numerous Coast Guard ships have served on the Bering Sea Patrol enforcing laws, transporting doctors, judges, teachers and missionaries to far-flung native villages, and rescuing mariners in distress. Although "CORWIN", "RUSH", "BEAR", and "NORTHLAND" were among the early cutters, in the years that followed, many other Coast Guard vessels provided needed supplies, medical attention, as well as mail and cheer to much of the scattered Alaskan population.

Gone, and possibly nearly forgotten, in a city where a local motto reads, "It's not the end of the world, but you can see it from here", lie buried several Bering Sea Patrol sailors of the

Revenue Cutter Service and the Coast Guard. Signs of age are evident in the isolated cemetery on the outskirts of the city of Unalaska, Alaska, located 543 miles southwest of Kodiak in the Aleutian Islands. Graves of sailors from the cutters "HAIDA", "PERRY", "RUSH", and "BEAR" were identified some years ago by volunteer crew members of the Coast Guard Cutter "STORIS". These crew members repaired many of the grave sites of the U.S. and British sailors, who died during the Bering Sea fur seal conflict between 1885 and 1911.

The causes of death of several of the sailors were identified. Records indicate that Seaman C.C. Mouthrope of the cutter "PERRY" died as a result of a fall from the cutter's mast; Coxswain Axel E. Johanson of the "BEAR" perished of exposure in 1905, and Seaman Rankin (the grave shows no first name) of the cutter "RUSH" died in 1906 of the flu when he was 19 years old.

The historic "Bering Sea Patrol" became a thing of the past in 1964. After nearly a century of service, its name was changed by the Coast Guard to the "Alaska Patrol" to conform with its widened arc of activity which, by then, stretched from the Alaska-Canadian border in the south to the Arctic Ocean in the north.

Now the patrol works closely with

*(Continued on page 3)*



## USCG Human Resources Service & Information Center

CAPT Robert J. Williamson  
Commanding Officer

CDR Paul Gauthier  
Executive Officer

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Operational Technical Director

Nancy L. Hawkins  
Chief, Retiree & Annuitant Services

Ronda L. Klein  
Editor, Retiree Newsletter

The Retiree Newsletter is a publication containing news of general interest, suggestions, and information to keep Coast Guard retirees and their dependents informed of recent developments. This publication shall not be considered authority and is non-record material.

(Continued from page 2)

Coast Guard planes to provide a combined air-surface operation in northern waters. One of its main functions is to enforce treaties with foreign nations in sealing and fishing activities.

In 1975, a group of 16 Coast Guardsmen who had sailed the Bering Sea Patrol before and during World War II, joined together to form the first Bering Sea Patrol Veterans Association. One of those men, Hulin Hurt, "took the helm" and arranged a "reunion" which was held in Oakland, California in 1976. That was the first of 23 reunions which followed.

Because of the relatively small number of those original Bering Sea Patrol sailors surviving, and because of the strong desire to keep the organization "alive", membership eligibility has broadened over the years, and now includes retired or former members of the U.S. Coast Guard who served on active duty in Alaska (17th Coast Guard District) for a continuous period of twenty-one (21) days and/or those who qualify to wear the Coast Guard Arctic Service Medal as a result of duties in Alaskan waters.

The Association's name was changed in 1992 to "Bering Sea Patrol – Alaska Veterans Association of the United States Coast Guard".

Membership has increased from the original 16 men to about 300 men and women, many of whom will be attending the association's 24th annual reunion in Reno, Nevada in September of this year.

In recent years, each reunion has adopted a "theme" honoring the Coast Guardsmen, and their vessels, who participated in certain types of service within the Coast Guard's areas of responsibility. In 1997, the reunion honored the crewmembers of the Coast Guard Cutters "STORIS", "SPAR" and "BRAMBLE" who, in 1957, successfully completed the first circumnavigation of the North American continent. The "theme" for the 1999 reunion will be



"Lighthouses, Loran Stations, and other shore duty stations in Alaska". Plans for the 25th annual reunion in the Year 2000 are also in progress, and it is contemplated that the "theme" for the 2000 reunion will be "The Coast Guard's role in Alaska". Although plans for the Year 2000 reunion are still somewhat tentative, it is contemplated that a 7-day cruise to Southeast Alaska may be in order.

Anyone interested in joining the Association and/or learning more about the forthcoming reunions should contact:

1999 Chairman Bill McIntire  
P.O. Box 2070  
Peachtree City, GA 30269

Phone: (770)631-3862  
Email: BMCXI@aol.com

or

2000 Chairman Jim Loback  
10436 Teal Circle  
Fountain Valley, CA 92708-7448

Phone: (714)968-8964  
Email: LOB96JM@aol.com

The 3-snake rule:

1. If you see a snake, kill it. Don't set up a snake committee. Don't set up a snake user group. Don't write snake memos. Kill it.
2. Don't play with dead snakes. (Don't revisit decisions).
3. All opportunities start out looking like snakes.

James Barksdale  
CEO, Netscape



## Help Wanted

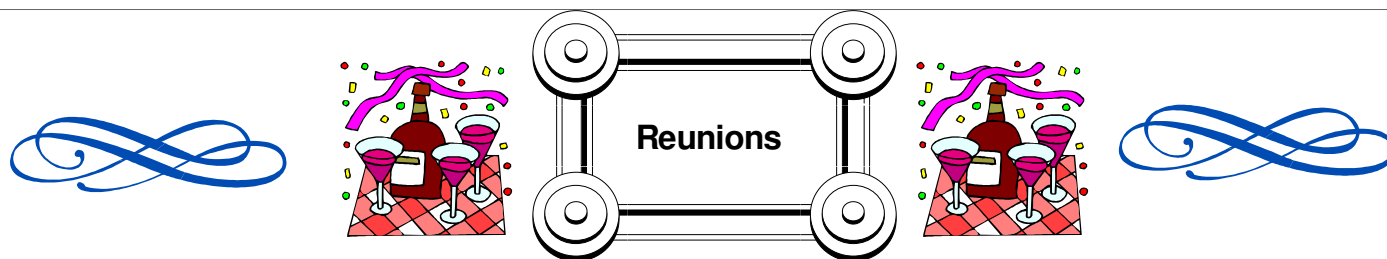


The Simulation Training and Research, or STAR Center of Ft Lauderdale, FL is seeking qualified candidates for the following positions:

**Program Coordinator:** This individual will coordinate a Simulator Based Performance Evaluation System for Marine Pilots for a state agency. The candidate will report to the Program Manager and be responsible for coordinating all aspects of the program. The ideal candidate should have an unlimited deep sea license/marine pilot experience(desired), intermediate to senior management experience.

Candidates with prior DoD and Coast Guard equivalency experience are acceptable and will be evaluated. Candidates with experience in the areas of maritime training, simulation training, job/task analysis, and curriculum development are particularly desired. **Integrated Bridge System & Marine Pilot Instructors:** Qualified deep sea Unlimited Masters & Marine Pilots are needed as simulator instructors. Passenger vessel experience a plus.

**Interested professionals should forward their resume with cover letter to Tom Johnson, Director of Training via fax at (954) 929-6043.**



**USCG BERING SEA PATROL – ALASKA VETERANS ASSOCIATION REUNION:** The reunion is scheduled to be held 14 – 17 September 1999, at the Flamingo Hilton Hotel in Reno, NV. As has become our tradition in honoring Coast Guardsmen, we have as the 1999 theme “Lighthouses, Loran Stations, Air Stations and other shore duties of the U.S.C.G. in Alaska”. For more information or reservations, please contact 1999 Chairman Bill McIntire at P.O. BOX 2070, Peachtree City, GA 30269; by phone at (770)631-3862; or via email at “bmcxi@aol.com”.

**USCGC WACHUSETT (WHEC-44):** Will be holding a reunion 24 – 26 September 1999 in Seattle, WA. For more information please contact Nels “Moose” Kjellin at 234 50th Ave W, Mountlake Terrace WA 98043; by phone at (425)774-2771 or Jim Ashe at 35 Lexington Ave, Gloversville, NY 01207-4201; by phone at (518)725-8377; or via email at “whec44@klink.net”. The Wachusett has a webpage at: “www.klink.net/~whec44”.

**USS COVINGTON (PF-56):** Crew members will hold their next reunion 9 – 11 September 1999 at the Holiday Inn-Riverfront, Covington, KY at the Mayors invitation. For further information please contact: Dan Clifford at 3715 River Oaks Drive, Des Moines, IA 50312-4634; by phone at (515)279-2069.

**USS BAYFIELD (APA-33):** A reunion has been scheduled to take place 8 – 12 October 1999 in San Antonio, TX. For further information contact George Sargent at 8861 South 3rd Street, Franklin, WI 53132-9193; by phone at (414)761-0829; or via email at “bfs1r1@aol.com”.

**USS TAUSSIG (DD746):** A 13th annual reunion is planned for 8 – 12 September 1999 at the Holiday Inn-Coliseum in Biloxi, MS. For information please contact Vincent Esposito at 7 Astronomy Lane, Levittown, NY 11756; or phone (516)579-4449.

**USS SPOKANE (CLAA-120):** The 3rd reunion has been tentatively scheduled for May or June 2000 in Spokane, WA. For information contact the USS Spokane Reunion Committee at 4979 Grimsby Drive, San Jose, CA 95130; or call (408)866-4392.

**USCGC SPENCER (W-36 & WMEC-905):** The 26th reunion has been scheduled for 24-27 September 1999 at the Radisson Hotel, 3000 Warrenville Road, Lisle/Naperville, IL (west of Chicago). For detailed information please contact R.T. “Tom” McCombs at 2001 Wheeler Street, Woodridge, IL 60517-1817; or via email at “cgenspencer@aol.com”.

**USS CALLAWAY (APA-35):** The 33rd annual reunion has been scheduled at the Hanalei Hotel in Dan Diego, CA on 5 – 7 October 1999. Please contact Wallace Shipp at 5319 Manning Place NW, Washington D.C. 20016; or phone (202) 363-3663.

**USCGC CAMPBELL (W-32 & WMEC-909):** The 14th annual reunion has been scheduled for 19 – 22 May 1999 at the Sheraton Inn-Airport, Warwick, RI. Please contact Dave Blum at 8341 Sands Point Blvd, Tamarac, FL 33321 or phone (954) 722-8161.

**TELEPHONE TECHNICIAN (TT/EMT):** All TT/EMT's, Enlisted and Officers and any others associated with us; you are invited to a reunion to be held 8 – 11 October 1999 at the Sea-Otel in Nags Head, NC. For additional information contact Shot/Umpy Cox at (252)473-2757; Bo Stapleton at (757)340-3732; or Ray Snow at (540)368-0677.

**USCG ACADEMY FILIPINO REUNION:** The 1st Filipino reunion for those who were stationed at the CG Academy during their career will be held at the Plaza Hotel Casino in Las Vegas, NV 26 – 29 September 1999. Deadline for reservations is 30 July 1999. For further information please contact QMC (Retired) D.S. “Alex” Alejandro at (425) 481-0112; via fax at (425)481-9240; or email “valejan963@aol.com”.



## Survivor Benefit Plan (SBP) open enrollment

**General:** Section 642 of Public Law (PL) 105-261 provides a period of open enrollment for participation in the Uniformed Services Survivor Benefit Plan (SBP).

**Open enrollment period:** The open enrollment period covers the period beginning 1 March 1999 and ending 29 February 2000.

**Members eligible to enroll:** You are eligible to make an election to participate in the SBP or the Supplemental Survivor Benefit Plan (SSBP) during this period of open enrollment using the following criteria.

1) If you are **not** participating in the SBP as of 28 February 1999, you have an eligible beneficiary, and are entitled to retired pay or would be entitled to retired pay but have not yet reached age 60, you may:

- a) Elect SBP coverage for an eligible beneficiary (spouse or former spouse, spouse or former spouse and child, child only, or eligible insurable interest person; and
- b) Elect SSBP coverage for spouse or former spouse if you have provided the SBP at the maximum level.  
*(Note: Reserve retirees who have an eligible spouse and are making an initial election for a reduced SBP base amount or child only coverage, under either the deferred or immediate option, must have the spouse's concurrence on the DD Form 2656-3, SBP Open Enrollment Form).*

2) If you are **now** participating in the SBP at some level, you may:

- a) Increase your SBP base amount to a larger amount not to exceed your gross retired pay.
- b) Add your eligible spouse or former spouse to existing child

coverage.

- c) Elect SSBP for spouse or former spouse if you have provided the SBP at the maximum level.

*(Note: If you dis-enrolled from the SBP under Public Law 105-85, you may not make an election under this open enrollment period.)*

3) If you are **now** participating in the SBP **you may not:**

- a) Add child coverage to existing spouse or former spouse coverage.
- b) Drop current SBP coverage.
- c) Decrease current SBP coverage.
- d) Elect SSBP if retired on or before 31 December 1956 because the annuity payable will not be subject to a social security offset.

**Making an election:** To make an open enrollment election, a member must complete and submit DD Form 2656-3 in accordance with the instructions printed on the form. Completed election forms received prior to 1 March 1999 will become effective 1 March 1999. Elections received after that date will become effective the month following the date the election is received by HRSIC if the postmark is a date within the open enrollment period.

**Effect of death within two years:** If the member makes an election during the open enrollment period and dies within two years of the effective date of the election, the election is void. All premiums attributable to the open enrollment election will be refunded in a lump sum payment to the person who would have been the beneficiary had the deceased member lived the required two years.

### Premium for Open Enrollment elections:

- 1) The Monthly premium. This premium pays for the coverage and be-

gins with the effective date of the election.

2) The one-time open enrollment (Buy-In) premium plus interest. This Buy-In premium will be computed based on the number of years that have elapsed since your first opportunity to participate in the SBP. These premiums are due at the time the member files an open enrollment election, and may be repaid with the following options:

- a. Lump sum repayment of the Buy-In premium plus 6.5% interest at the time of election.
- b. Partial lump sum payment plus 6.5% interest at the time of election, with the remainder deducted from retired pay in 24 equal monthly installments.
- c. The total Buy-In premium plus 6.5% interest, paid by deductions from retired pay in 24 equal monthly installments.

*(Note: The member must pay in a lump sum at the time of application any amount that cannot be deducted by the end of 24 months. If the member experiences a reduction in net retired pay for any reason, which affects ability to repay the Buy-In premium within the 24 months, an additional lump sum payment must be made.)*

### Supplemental Survivor Benefit Plan coverage (SSBP):

If you are now a participant in the SBP, or if you enroll during the open enrollment period effective 1 March 1999, you may also enroll in SSBP. It has been designed to allow you to replace some or all of the annuity reduction that will take effect when your spouse/former spouse annuitant reaches age 62.

If you elect SSBP, your SSBP premium is determined by the additional coverage you elect. The premium will be maintained as a separate cost and increased by the same cost-of-living adjustment as applied to your retired pay.

The SSBP premium reduces taxable wages the same as the SBP Basic.

*(Continued on page 6)*

(Continued from page 5)

### Options under SSBP:

- 1) Members who retired on or after 1 January 1957 may elect SSBP if SBP coverage for spouse or former spouse is at the maximum level.
- 2) SSBP may be elected upon remarriage if member had prior spouse SBP coverage.
- 3) SSBP coverage may be increased (if currently below 20%) upon remarriage or during an open enrollment.
- 4) SSBP coverage may be elected in 5 percent increments to replace 5, 10, 15 or 20 percent of the annuity lost age 62. The factor associated with your age at election is used against the percent you elect to determine the premium cost.

### When is the SSBP payable to the annuitant:

- 1) When an annuitant receiving an SBP annuity reaches age 62.
- 2) SSBP is not affected by the Dependency Indemnity Compensation (DIC) reduction. Only the SBP annuity will be reduced by any DIC being paid.

### Other facts concerning SSBP:

- 1) SSBP may only be elected if your SBP base amount is at the maximum level. This means that if you previously elected a reduced SBP Base amount you must increase your SBP Base amount to the maximum level during the open enrollment period to be eligible to participate in the SSBP.
- 2) An election to provide an SSBP annuity will remain effective as long as SBP coverage remains in effect for your spouse or former spouse.
- 3) Once effective, no election for SSBP may be revoked. However, whenever your beneficiary status changes under the SBP, the SSBP status will also change.

- 4) If you were eligible to retire on or before 1 October 1985, the SSBP would probably **not** be the best choice for you. Annuitants of most Reserve retirees meeting this criteria will have a larger annuity computed under the social security offset rather than a computation under the two-tier system (55/35%). Therefore, if your retirement meets this criteria and you elect SSBP, you must waive the right to have your SBP annuity computed under the social security offset system at a later time.

### SSBP coverage for a former spouse:

- 1) Retirees with former spouse SBP coverage whose date of divorce is prior to 29 November 1989 do not need SSBP coverage. The former spouse's annuity is exempt from the social security offset at age 62.
- 2) If a member voluntarily enters into an agreement with his/her former spouse to elect SSBP, the SSBP may be deemed in the same manner as an SBP election can be deemed.

### Additional information concerning the SBP and SSBP open enrollment season:

- 1) There will be no annuity payable until your open enrollment election has been in effect for two years.
- 2) Your monthly premium will start the month following receipt of your election form.
- 3) A payment plan must be established to fully pay the Buy-In premium within 24 months from the date of receipt of the enrollment form.
- 4) If the member dies prior to the end of the two year period, the open enrollment election becomes void. Your two year period begins the month your enrollment and costs are effective.

- 5) Any premiums collected that are attributable to the open enrollment election will be refunded in a lump sum payment to the person who would have been the beneficiary had the deceased member lived the required two years.
- 6) If the beneficiary named on the open enrollment election dies during the two year period the monthly premium costs will be stopped the month following the death. However, the Buy-In premium will continue and be collected within the 24 months agreed.
- 7) Open enrollment elections for SBP and SSBP do not require spousal concurrence with the following exception: Reserve retirees who have an eligible spouse and are making an initial election for a reduced SBP base amount or child only coverage under either the deferred or immediate option, must have the spouse's concurrence on the DD Form 2656-3, SBP Open Enrollment Election Form.

**If you want to enroll:** Retirees who want to enroll in SBP or SSBP during the open enrollment period should complete DD Form 2656-3, SBP Open Enrollment Election Form, (see page 11 of this newsletter) as soon as possible and forward promptly to:

**Commanding Officer (RAS - SBP OPEN ENROLLMENT)  
USCG Human Resources Service  
& Information Center  
444 SE Quincy Street  
Topeka, KS 66683-3591**

Your open enrollment election becomes effective the first day of the month following receipt of the election form at HRSIC(RAS), but not earlier than 1 March 1999.

Examples of cost computation are included in this Newsletter on pages 8 & 9. Please write to us if you would like to request an estimate of costs for enrollment into SBP, or increasing

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(Continued from page 6)

the amount of your SBP coverage.

If you have any questions, please call HRSIC(RAS) toll free at 1-800-772-8724 or commercial (785)357-3415.

You can find  
your  
**DD Form 2656-3,**  
**SBP Open**  
**Enrollment**  
**Election, form &**  
**instructions**  
**starting on**  
**page 11 of your**  
**newsletter**



It's paradoxical that  
the idea of living a  
long life appeals to  
everyone,  
but the idea of  
getting old doesn't  
appeal to anyone!

Andy Rooney  
Broadcast Commentator

## FYI: Laws authorize other changes to the Survivor Benefit Plan

The Department of Defense Authorization Act of 1999 has authorized under Public Law 105-85 and Public Law 105-261 the following changes to the Survivor Benefit Plan (SBP):

- 1) Public Law 105-85, **Discontinuance of SBP Participation on Second Anniversary**, allows a one year period beginning two years after commencement of retired pay during which SBP participants may choose to discontinue participation in the Plan.
- 2) Public Law 105-261, Section 641, **Paid-Up Coverage Under Survivor Benefit Plan** allows no further reductions of SBP premiums from your retired pay if you have been a participating member of SBP who attains 70 years of age OR 360 months (30 years) of premium payments, whichever occurs later.

\* **The first opportunity for paid up entitlements begins 1 October 2008.** If you make a change to your level of SBP coverage, premiums will be discontinued for only that portion of the premiums pertaining to the qualified level of coverage. For example, consider a member who joined SBP upon retirement 30 years ago. His initial participation was with a minimum \$300 base amount, a premium of \$7.50 per month, and a gross retired pay of \$1,000. The member increased to full coverage during an open enrollment 20 years ago. Today, the member has paid 360 months of premiums against the original base amount, now increased to \$600 with a premium of \$15.00 and a gross retired pay of \$2,000. The member has paid 240 months for full coverage, currently \$2,000 with a premium of \$130. The member's \$15 premium should

*be discontinued, but the additional \$115 of premiums must continue to be deducted for another 10 years.*

- 3) Public Law 105-261, Section 643, **Effective Date of Court-Required Coverage for former spouse** requires SBP premiums be charged against a members retired pay beginning with the date of a court-ordered divorce if member is required to provide for former spouse SBP coverage and date of divorce is on or after 17 October 1998. If an election is not received from the retired member within one year of the date of divorce, the former spouse may request a deemed election. If member follows the stipulation of the court order, but makes the election for former spouse SBP coverage several months after the date of divorce, an overpayment of premiums will be charged to the member. *Previously the retired member had a year from the date of divorce to comply with the court-ordered elections of former spouse coverage for SBP.*



## Examples:

A married member retired in 1976, but declined to elect coverage for his wife. He now wishes to protect his full retired pay (\$1,000), which would pay his wife \$550 per month until she is age 62 and \$350 when she is age 62 or older. The normal monthly premiums for this level of coverage would be \$65. Table 1 shows the per dollar penalty factor to be 382 for the 23 years since the member's retirement. Therefore, this retiree's retroactive costs would be about \$24,830 (382 times \$65) and he would have to remit that amount to CG HRSIC (RAS) within 24 months after making the election. In addition to the lump-sum buy-in, on-going monthly costs of \$65 will be deducted from the members retired pay until his death, or his wife dies, or they divorce, losing her eligibility.

Now, let's look at a little different case. For this example, the married member retired in 1986 and elected reduced coverage for his wife. He now wishes to increase coverage by doubling his base amount. By increasing the level of coverage from the current amount of \$1,000 to \$2,000, he would ensure his wife would receive twice the amount of her original payment: \$1,100 per month until she is age 62 (\$700 when she is age 62 or older).

The normal monthly premiums for this level of coverage would also double and become \$130 (\$2,000 times 6.5 percent). Table 1 shows the per dollar penalty factor to be 200 for 13 years since the member's retirement. Therefore, this retiree's retroactive costs would be about \$13,000 (200 times \$65 [the additional cost to increase the base amount by \$1,000]). He would have to remit that amount to CG HRSIC (RAS) within 24 months after making the election and the new monthly premium of \$130 would continue until his death, or the wife loses eligibility.

One more illustration: a member has spouse coverage based on full retired pay. When SSBP became available for retirees (1 Apr 92), he

didn't elect that additional level of coverage then, but wants to purchase it now. The member is 58 years of age, his gross retired pay is \$1,000, and the monthly premium to add the 20 percent level of SSBP coverage would require a buy-in of approximately \$9,970.

To calculate this amount, refer to Table 2: the SSBP factor for a 58 year old member is .0242 for each 5 percent block. Multiply .0242 by 4, then multiply \$1000 by .0968 to obtain the monthly cost for 20 percent SSBP, or \$96.80. Then refer to Table 3 and multiply \$96.80 times 103 (7 years since the 1992 "event" when SSBP first became available to members who were already retired), to obtain the lump-sum, buy-in amount of about \$9,970. The normal monthly premium of \$161.80 (\$65 for SBP plus \$96.80 for the SSBP portion), will continue until the member dies, or the wife loses her eligibility.

Purchase of the SSBP will ensure the widow's payments are not reduced when she turns age 62. If the retiree has no SSBP coverage, his widow's annuity would drop to \$350 at age 62, but if he adds SSBP, she will receive both SBP (35 percent of his retired pay) and SSBP (20 percent of his retired pay), keeping her monthly payments at \$550 even after turning 62.

Remember, the repayment must be completed in 24 months and the retiree must live for 24 months before the new beneficiary becomes eligible, or an increased annuity becomes payable.

Details on electing coverage for children, or an insurable interest person, as well as other features of the open enrollment, may be obtained from an SBP counselor at CG HRSIC (RAS).

### TABLE 1

#### Spouse & Spouse/Child

Completed years since "event"	Lump-sum factor per \$1 of monthly premium
0	43
1	53
2	63
3	72
4	82
5	91
6	100
7	124
8	133
9	141
10	150
11	166
12	182
13	200
14	218
15	236
16	256
17	276
18	295
19	314
20	332
21	349
22	366
23	382
24	399
25	415
26	429

**TABLES 2 & 3 are located on page 9**

"Access to power must be confined to men who are not in love with it."

Plato  
Philosopher





**TABLE 2****1999 Open Season Premium for 5% SBP Supplement****When surviving spouse reaches age 62**

<b>Age at election</b>	<b>Premium</b>	<b>Age at election</b>	<b>Premium</b>
16	0.0048	63	0.0321
17	0.0050	64	0.0346
18	0.0053	65	0.0359
19	0.0055	66	0.0377
20	0.0057	67	0.0398
21	0.0059	68	0.0400
22	0.0062	69	0.0415
23	0.0065	70	0.0430
24	0.0068	71	0.0453
25	0.0071	72	0.0482
26	0.0074	73	0.0484
27	0.0078	74	0.0515
28	0.0081	75	0.0543
29	0.0085	76	0.0567
30	0.0089	77	0.0593
31	0.0089	78	0.0620
32	0.0093	79	0.0649
33	0.0098	80	0.0681
34	0.0103	81	0.0711
35	0.0108	82	0.0742
36	0.0113	83	0.0775
37	0.0089	84	0.0811
38	0.0093	85	0.0851
39	0.0096	86	0.0888
40	0.0099	87	0.0928
41	0.0106	88	0.0976
42	0.0105	89	0.1019
43	0.0108	90	0.1070
44	0.0114	91	0.1135
45	0.0119	92	0.1200
46	0.0127	93	0.1267
47	0.0133	94	0.1334
48	0.0138	95	0.1401
49	0.0146	96	0.1464
50	0.0156	97	0.1519
51	0.0163	98	0.1528
52	0.0172	99	0.1515
53	0.0181	100	0.1502
54	0.0193	101	0.1490
55	0.0203	102	0.1482
56	0.0219	103	0.1481
57	0.0229	104	0.1494
58	0.0242	105	0.1537
59	0.0257	106	0.1647
60	0.0262	107	0.1933
61	0.0295	108	0.2916
62	0.0302	109	0.4554

**Note:**

- 1) Use member's age at election to the nearest birthday**
- 2) The premium is given as a proportion of the base amount**
- 3) In the event of remarriage, use age at open season election of the supplement**

**TABLE 3****1999 Open Season Lump Sum Factors for SBP Insurable Interest and Supplemental SBP**

<b>Completed years since "event"</b>	<b>Lump sum factor per \$1 of monthly premium</b>
0	6
1	19
2	32
3	45
4	59
5	73
6	88
7	103
8	118
9	134
10	150
11	166
12	182
13	200
14	218
15	236
16	256
17	276
18	295
19	314
20	332
21	349
22	366
23	382
24	399
25	415
26	429

"Life ain't in holding a good hand, but in playing a poor hand well."

Epitaph for gambler Jack King

## Social Security & the Survivor Benefit Plan (SBP)

In 1972 the SBP was established to ensure that surviving spouses of military retirees had an opportunity to receive a lifetime income from the federal government should something happen to the member. That income was to equal at least 55% of the member's elected SBP amount, and was to continue until the surviving spouse reached the age of 62. The amount of the SBP base is selected by the retiree, and may be from \$300.00 up to the full amount of gross retired pay. At age 62, the benefit total consists of funds from SBP and social security entitlement based on the member's total wages.

When Congress enacted the SBP, it structured the monthly cost and benefit levels to be integrated with social security entitlement. Due to the complexity of both the SBP and the Social Security programs, many retirees have the misconception that at age 62, their survivors lose a portion of the benefits for which they have paid. This is not the case. The premiums were established at a rate that would result in the federal government subsidizing approximately 40% of the benefits paid under the program.

SBP benefits continuing at age 62, are computed by either the Social Security Offset method, or the Two-Tier method as explained below.

**Social Security Offset:** If you were retired as of 1 October 1985, or had completed at least 20 years of service, your spouse qualified for the offset method. Under this method, when your spouse is age 62 or older, the 55% SBP benefit is reduced by the amount of Social Security benefits based only on your military wages after 31 December 1956. The amount of reduction is computed using your active duty, and active duty for training wages. Social Security wage credits earned through civilian employment do not affect the reduction. Civilian employment covered by Social Security will increase your Social Security benefits and result in your surviving spouse's Social Security payment being even greater than the

amount of the SBP offset.

**Two-Tier system:** When your spouse reaches age 62, and the basic SBP benefit decreases from 55% to 35%, in most cases the Social Security benefit entitlement will allow your spouse to maintain a total income of at least 55% of the base amount of the SBP coverage elected. Spouses of members reaching 20 years of service after 1 October 1985, are projected to qualify for a Social Security survivor benefit equal to at least 40% of their retired pay (may be marginally less for spouses of members in grades O-7 and above with more than 28 years of service). The result: SBP plus Social Security survivor payment for your surviving spouse is projected to equal or exceed 55% of the base amount you elect.

If qualified for the offset method, the surviving spouse's benefit will be computed using both the offset and two-tier method. The method that provides the greatest benefit will be used unless the offset method was waived by electing the Supplemental Survivor Benefit Plan (SSBP). Among members retiring today, only flag rank officers are expected to benefit from the offset, because Social Security payments are relatively higher for lower grades. The following example is based on such a member:

*Member eligible to retire before 1 October 1985.*

### **Two-tier method**

SBP base amount.....\$5,000.00  
SBP Entitlement.....\$2,750.00  
based on 55% (before age 62)  
SBP Entitlement.....\$1,750.00  
based on 35% (age 62 or older)

### **Social Security Offset (SSO) method**

Social Security survivor entitlement (based only on military wages after 31 December 1956).....\$ 900.00  
SBP payment is computed as follows:

SBP benefit before 62     \$2,750.00  
(55% of SBP base amt)  
Less SSO.....\$ 900.00  
Total Monthly SBP pay....\$1,850.00

The maximum offset is limited to 40% of the annuity amount, or \$1,000.00 (\$2,750 X 40%). Since the constructed offset (\$900.00) is less than the maximum offset (\$1,100.00), the offset in this case is \$900.00. And since the SSO computation provides a greater SBP benefit, (\$1,850.00) than the two-tier system (\$1,750.00), it will apply. Social Security benefits and the new SBP payment should equal or exceed the amount of SBP previously being paid.

TROA membership is not required to subscribe to TROA's free weekly email legislative updates. If you would like more information, call TROA's member service center at 1-800-245-8762, or send your request via email to "member@troa.org". Be sure to include your full name, grade, service, and mailing address (including zip code), so TROA can match your email address with issues pertaining to you and your specific legislators.

**SURVIVOR BENEFIT PLAN (SBP)  
AND RESERVE COMPONENT SURVIVOR BENEFIT PLAN (RCSBP)  
OPEN ENROLLMENT ELECTION**

*(Public Law 105-261) (March 1, 1999 - February 29, 2000)  
(Please read Privacy Act Statement and Instructions before completing form.)*

**SECTION I - MEMBER INFORMATION**

<b>1. NAME</b> <i>(Last, First, Middle Initial)</i>	<b>2. SSN</b>	<b>3. RETIREMENT/ TRANSFER DATE</b> <i>(YYYYMMDD)</i>	<b>4. RANK/PAY GRADE/ BRANCH OF SERVICE</b>	<b>5. DATE OF BIRTH</b> <i>(YYYYMMDD)</i>
<b>6. CORRESPONDENCE ADDRESS</b> <i>(Ensure your finance center or reserve personnel center is advised whenever your correspondence address changes.)</i>				
<b>a. STREET ADDRESS</b> <i>(Include apartment number)</i>	<b>b. CITY</b>	<b>c. STATE</b>	<b>d. ZIP CODE</b>	<b>e. TELEPHONE</b> <i>(Incl. area code)</i>

**SECTION II - BENEFICIARY INFORMATION** *(This section must be completed regardless of SBP/RCSBP Election.)*

<b>7. SPOUSE</b>			<b>8. DATE OF MARRIAGE</b> <i>(YYYYMMDD)</i>	<b>9. PLACE OF MARRIAGE</b> <i>(See Instructions)</i>
<b>a. NAME</b> <i>(Last, First, Middle Initial)</i>	<b>b. SSN</b>	<b>c. DATE OF BIRTH</b> <i>(YYYYMMDD)</i>		
<b>10. DEPENDENT CHILDREN</b> <i>(Indicate which child(ren) resulted from marriage to former spouse by entering (FS) after relationship in column d.)</i>				
<b>a. NAME</b> <i>(Last, First, Middle Initial)</i>	<b>b. SSN</b>	<b>c. DATE OF BIRTH</b> <i>(YYYYMMDD)</i>	<b>d. RELATIONSHIP</b> <i>(Son, daughter, stepson, etc.)</i>	<b>e. INCAPACITATED?</b> <i>(Yes/No)</i>

**SECTION III - ELECTION OF COVERAGE**

<b>11. BENEFICIARY CATEGORY(IES)</b> <i>(Initial one item only.) (See Instructions.)</i> <b>I ELECT COVERAGE FOR:</b>				
	<b>a. SPOUSE ONLY.</b>			
	<b>b. SPOUSE AND CHILD(REN).</b>			
	<b>c. CHILD(REN) ONLY.</b>			
	<b>d. NATURAL PERSON WITH INSURABLE INTEREST</b> <i>(Complete Item 13).</i>			
	<b>e. FORMER SPOUSE</b> <i>(Complete DD 2656-1, "Survivor Benefit Plan (SBP) Election Statement for Former Spouse Coverage", or the HRSIC Form CG-4700 (Coast Guard).)</i>			
	<b>f. FORMER SPOUSE AND DEPENDENT CHILD(REN) OF THAT MARRIAGE</b> <i>(Complete DD 2656-1, "Survivor Benefit Plan (SBP) Election Statement for Former Spouse Coverage", or the HRSIC Form CG-4700 (Coast Guard).)</i>			
<b>12. LEVEL OF COVERAGE</b> <i>(Initial one item only. Complete UNLESS 11.d. was selected above.)</i>				
	<b>a. I ELECT COVERAGE BASED ON FULL GROSS RETIRED PAY.</b>			
	<b>b. I ELECT COVERAGE BASED ON A REDUCED BASE AMOUNT OF \$ _____</b> <i>(See Instructions).</i>			
	<b>c. I ELECT TO INCREASE MY CURRENT REDUCED BASE AMOUNT TO A HIGHER BASE AMOUNT THAT IS LESS THAN FULL GROSS RETIRED PAY</b> <i>(Enter desired base amount \$ _____).</i>			
	<b>d. I ELECT COVERAGE BASED ON FULL GROSS RETIRED PAY PLUS SUPPLEMENTAL COVERAGE OF: (X one)</b>			
	<input type="checkbox"/> 5%	<input type="checkbox"/> 10%	<input type="checkbox"/> 15%	<input type="checkbox"/> 20%

**13. INSURABLE INTEREST BENEFICIARY**

<b>a. NAME</b> <i>(Last, First, Middle Initial)</i>	<b>b. SSN</b>	<b>c. RELATIONSHIP</b>	<b>d. DATE OF BIRTH</b> <i>(YYYYMMDD)</i>
<b>e. STREET ADDRESS</b> <i>(Include apartment number)</i>	<b>f. CITY</b>		<b>g. STATE</b> <b>h. ZIP CODE</b>

**SECTION IV - REMARKS**

14. USE THIS SECTION TO CONTINUE AN ITEM OR MAKE ADDITIONAL COMMENTS.

**SECTION V - MARITAL STATUS HISTORY**

15. INDICATE DATE(S) OF PREVIOUS MARRIAGE(S) AND DIVORCE(S), IF ANY.

**SECTION VI - ENROLLMENT PREMIUM PAYMENT INFORMATION**

*(Payments under this section are in addition to normal monthly premiums. Use the Premium Tables to determine the amount owed.)*

**16. ENROLLMENT PREMIUM OPTIONS** *(Initial one) (See Instructions)*

	a. IMMEDIATE FULL ENROLLMENT PREMIUM PAYMENT OF \$ _____ <i>(payment attached).</i>
	b. IMMEDIATE PARTIAL ENROLLMENT PREMIUM PAYMENT OF \$ _____ <i>(payment attached).</i> The remainder due will be deducted from retired pay in 24 monthly installments.
	c. FULL ENROLLMENT PREMIUM AMOUNT DEDUCTED FROM RETIRED PAY IN 24 MONTHLY INSTALLMENTS

**SECTION VII - MEMBER OF A RESERVE COMPONENT**

*(Complete only if you are a member or a former member of a Reserve Component who has completed qualifying service for retired pay at age 60.)*

**17. I ELECT RESERVE COMPONENT SURVIVOR BENEFIT PLAN (RCSBP)** *(Initial one)*

a. CHANGE MY ELECTION FROM DEFERRED TO IMMEDIATE ANNUITY <i>(from Option B to Option C).</i>	b. DEFERRED ANNUITY UNTIL AGE 60 <i>(Option B).</i>	c. IMMEDIATE ANNUITY <i>(Option C).</i>
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**SECTION VIII - SPOUSE CONCURRENCE FOR RESERVE COMPONENT SURVIVOR BENEFIT PLAN ELECTION ONLY**

*(Required when a Reserve member is married and elects child(ren) only coverage or does not elect full spouse coverage.)*

**18. SPOUSE.**

I hereby concur with the Reserve Component Survivor Benefit Plan election made by my spouse. I have signed this statement of my free will.

a. SIGNATURE		b. DATE SIGNED (YYYYMMDD)	
19.a. WITNESS NAME <i>(Last, First, Middle Initial)</i>	b. SIGNATURE	c. DATE SIGNED (YYYYMMDD)	
d. STREET ADDRESS <i>(Include apartment number)</i>	e. CITY	f. STATE	g. ZIP CODE

**SECTION IX - CERTIFICATION**

20. Under penalties of perjury, I certify that all statements on this form are made with full knowledge of the penalties for making false statements. *(18 U.S. Code 287 and 1001 provide for a penalty of not more than \$10,000 fine, or 5 years in prison or both.)* I further understand that my enrollment in the SBP/RCSBP is contingent upon payment of all premiums due. I understand this election is irrevocable, except as described in the instructions, and that the election is void if I do not live for 24 months from the effective date of the election.

a. MEMBER SIGNATURE	b. DATE SIGNED (YYYYMMDD)
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**SURVIVOR BENEFIT PLAN (SBP)  
AND RESERVE COMPONENT SURVIVOR BENEFIT PLAN (RCSBP)  
OPEN ENROLLMENT ELECTION**

*(Public Law 105-261) (March 1, 1999 - February 29, 2000)*

**PRIVACY ACT STATEMENT**

**AUTHORITY:** 10 U.S. Code 1401; 10 U.S. Code 2771; 10 U.S. Code 1477; PL 92-425 (September 21, 1972, as amended) and EO 9397.

**PRINCIPAL PURPOSE(S):** To permit eligible individual to make Survivor Benefit Plan, Reserve Component Survivor Benefit Plan and Supplemental Survivor Benefit Plan elections during the open enrollment period (March 1, 1999 through February 29, 2000).

**ROUTINE USE(S):** None.

**DISCLOSURE:** Voluntary; however, failure to furnish requested information will result in delays in adjusting pay and amounts not being properly computed.

**INSTRUCTIONS**

**GENERAL.**

1. Read these instructions carefully before completing the form.

2. Ensure that you advise your finance center (see below for address) of your marital status, correspondence and check address changes, at all times. Reserve Members must notify their personnel center of their marital status and correspondence address at all times.

3. For retirees who are receiving retired pay, mail your election (use of certified or registered mail with return receipt requested is strongly recommended) to the appropriate Uniformed Service designated agent. The Uniformed Services' designated agents are:

(a) **ARMY, NAVY, AIR FORCE AND MARINE CORPS:** Director, DFAS-Cleveland Center, 1240 East 9th Street, Code FTBCB, Cleveland, OH 44199-2056;

(b) **COAST GUARD:** Commanding Officer (RAS), Coast Guard Human Resources Service and Information Center, 444 SE Quincy St., Topeka, KS 66683-3591;

(c) **PUBLIC HEALTH SERVICE:** Department of Health and Human Services, Human Services Compensation Branch, 5600 Fishers Lane, Room 4-50, Rockville, MD 20857;

(d) **NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION:** Same as U.S. Coast Guard.

4. For Reserve Members who have not received retired pay, mail your election (use of certified or registered mail with return receipt requested is strongly recommended) to the appropriate Branch of Service as follows:

(a) **ARMY:** Commander, AR-PERSCOM, Attn: ARPC-PSP-T, 9700 Page Ave., St. Louis, MO 63132-5200;

(b) **NAVY:** U.S. Naval Reserve Personnel Center (Code N222), 4400 Dauphine Street, New Orleans, LA 70149-7800;

(c) **AIR FORCE:** Headquarters, ARPC/DRSE, 6760 E. Irvington Place, #3800, Denver, CO 80280-3800;

(d) **MARINE CORPS:** Headquarters, U.S. Marine Corps, Code MMSR-6, 3280 Russell Road, Quantico, VA 22134-5103;

(e) **COAST GUARD:** Commanding Officer (RAS), Coast Guard Human Resources Service and Information Center, 444 SE Quincy St., Topeka, KS 66683-3591;

(f) **PUBLIC HEALTH SERVICE:** Department of Health and Human Services, Human Services Compensation Branch, 5600 Fishers Lane, Room 4-50, Rockville, MD 20857.

**SECTION I - MEMBER INFORMATION.**

ITEMS 1 and 2. Self-explanatory.

ITEM 3. If you are retired from active duty, enter the date of retirement or the date of transfer to the Fleet Reserve. If you are a Reserve member whose eligibility for retired pay arises under Title 10, U.S.C. Chapter 1223, enter either the date of your 60th birthday, or the later date on which you applied to receive retired pay.

ITEMS 4 and 5. Self-explanatory.

ITEM 6. Enter the address and telephone number (including area code) where you can be contacted.

**SECTION II - BENEFICIARY INFORMATION.**

This information is needed to determine SBP/RCSBP premiums and annuities at the time of death.

ITEM 7.a. Provide your spouse's name and requested information. Also, attach a copy of your marriage certificate. If you have no spouse, enter "N/A".

7.b. through 9. Provide the requested information about your spouse. In Item 9, if marriage occurred outside the United States, include city, province, and name of country.

ITEM 10. If you do not have dependent children, enter "N/A" in this item. If you elect coverage for your dependent children, provide the requested information and attach copy of birth certificate(s).

10.e. An incapacitated child is an unmarried child who has become incapable of self support before the age of 18, or after the age of 18 but before age 22 while a full time student. Documentation is required.



### SECTION III - ELECTION OF COVERAGE.

NOTE: Election becomes effective on the first day of the month after the month it is received by your finance center or the reserve personnel center for Reserve Members awaiting retired pay. You must live for 24 months from the effective date in order for the beneficiary to receive an annuity.

ITEM 11. Complete if you retired from active duty or if you are a reservist whose eligibility for retired pay arises under Title 10, U.S.C. Chapter 1223, who declined SBP or made no RCSBP election. You may only select one election option.

11.a. through 11.c. Initial the applicable item that indicates the category of beneficiaries you desire to cover, or add a category of beneficiary to existing coverage. For example, if you have "Child Only" coverage and wish to elect coverage for your spouse, initial Block 11.b.

11.d. Initial if you are not married, or unmarried with one dependent child at retirement and have never married since, and desire coverage for a person with an insurable interest in you, and provide the requested information about that person in Item 13. An election of this type must be based on your full gross retired/retainer pay. If the person is not a relative, is a cousin or is more distantly related, attach evidence that the person has a financial interest in the continuance of your life. Under provisions of Public Law 103-337, you are permitted to withdraw from insurable interest coverage at any time. Such a withdrawal is effective on the first day of the month following the month the request is received by your finance center. There is no refund of SBP premiums collected before the effective date of the withdrawal.

11.e. and 11.f. Initial Item 11.e. if you desire coverage for a former spouse. Initial Item 11.f. if you desire coverage for a former spouse and dependent child(ren) of that marriage, and provide the requested information about these children in Item 10 as appropriate. Provide a certified photocopy of final decree of divorce that includes separation agreement or property settlement which discusses SBP for former spouse coverage. The DD Form 2656-1, "Survivor Benefit Plan (SBP) Election Statement for Former Spouse Coverage", or the HRSIC Form CG-4700 (Coast Guard) must be completed and accompany this form.

ITEM 12. You cannot decrease the level of coverage. If you have coverage based on full retired pay and add a category of beneficiary not previously covered, (i.e., if you are adding your spouse to existing child only coverage based on full retired pay), you may not select a reduced amount.

12.a. Initial if you desire coverage based on your full gross retired/retainer pay without Supplemental SBP.

12.b. Initial if you desire coverage based on a reduced portion of your retired/retainer pay. This reduced amount may not be less than \$300.00. If your full gross retired/retainer pay is less than \$300.00, the full gross pay is automatically used as the base amount. Enter the desired amount in the space provided to the right of this item.

12.c. Initial if you are a current participant and desire to increase your base amount. Enter the desired amount in the space provided to the right of this item.

12.d. Initial if you desire coverage based on your full gross retired/retainer pay plus Supplemental SBP for spouse/former spouse. Mark the appropriate percentage of coverage. The benefits are paid to a surviving spouse/former spouse who is age 62 or older.

ITEM 13. Enter the information for insurable interest beneficiary and provide a copy of the birth certificate(s). (See Item 11.d. above.)

### SECTION IV - REMARKS.

ITEM 14. Reference each entry by item number.

### SECTION V - MARITAL STATUS HISTORY.

ITEM 15. Indicate date(s) of previous marriage(s) and divorce(s), if any.

### SECTION VI - ENROLLMENT PREMIUM PAYMENT INFORMATION.

Payments under this section are in addition to your normal monthly premiums. Refer to the Premium Tables to determine the total enrollment premium amount owed. Choose one of the three payment options provided.

NOTE: **Make your check payable to DFAS-Cleveland Center or U.S. Coast Guard as appropriate. Annotate on the check your Social Security Number and "SBP OPEN ENROLLMENT".** Once your finance center receives your election, you will be notified of any amount owed. If you should desire to void your election, you must notify your finance center in writing within 30 days.

### SECTION VII - MEMBER OF A RESERVE COMPONENT.

Members whose eligibility for retired pay arises under Title 10, U.S.C. Chapter 1223, who did not elect Reserve Component Survivor Benefit Plan (RCSBP) after qualifying years of service, or elected RCSBP Deferred must complete this section. If you previously made a RCSBP election, attach a copy of your RCSBP election.

NOTE: If you desire to void your election, you must notify your reserve personnel center in writing within 30 days.

ITEM 17.a. Initial this block if you have elected Option B and would like to change to Option C. See Items 17.b. and 17.c. for more detail.

17.b. Initial this block if your last election was Option A. Option A defers a survivor annuity election or declines RCSBP coverage until age 60. By initialing Option B, you elect to provide a deferred survivor annuity to your beneficiary(ies) that begins on the 60th anniversary of your birth, or the day after your death, whichever is later.

17.c. Initial this block if your last election was Option A and you would like to change it to Option C. By initialing Option C, you elect to provide an immediate survivor annuity beginning on the day after your death, whether before or after age 60.

### SECTION VIII - SPOUSE CONCURRENCE FOR RESERVE COMPONENT SURVIVOR BENEFIT PLAN ELECTION ONLY.

Title 10 U.S.C. 1448 requires that an otherwise eligible spouse must concur if a member elects less than maximum coverage or elects child only coverage. The spouse's concurrence must be obtained and dated on or after the date of the member's election. If concurrence is not obtained when required, maximum coverage will be established for your spouse and child(ren) if appropriate. The spouse and the witness must complete items 18 and 19. The witness cannot be named as the beneficiary in Sections II and III, and cannot be the retiree.

### SECTION IX - CERTIFICATION.

Read the statement carefully, then sign your name and indicate the date of signature. For your SBP/RCSBP election to be valid, you must sign and date the form.



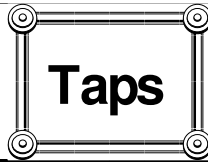
# Retirements



LAST NAME	FIRST NAME	RANK	RETIREMENT
			DATE
ALBERT	PHILIP	RDC	990101
ALLEN	WILLIAM	QM1	981201
ANDERSON	DOUGLAS	LT	981221
ARMBRISTER	BLAIR	MKC	990101
ATLEE	RICHARD	CDR	990101
AUSTIN	ROBERT	CDR	990101
BARRY	PATRICK	ASM1	990101
BENGGIO	BRADFORD	LCDR	990101
BOONE	PHILLIP	MK1	981121
BORTNIAK	JOHN	CDR	990101
BOYD	JAY	CDR	990101
BREWTON	CHRISTOPHER	LCDR	990101
BRISCOE	GREGORY	DC2	981201
BUCHHORN	LEE	CWO3	990101
BUETOW	GARY	CWO4	981117
BULLA	DIONNE	SK1	981129
BURBANK	ROBERT	LCDR	981127
BURKE	CHARLES	MKC	981201
BURROUGHS	JAN	CWO4	981201
BUSH	JOHN	BM1	990101
CALLAWAY	BRUCE	SK1	990101
CAMERON	ERIC	MK3	981113
CAMPBELL	RICHARD	QMCS	981001
CHENG	JOSEPH	DP1	981210
CIRELLI	NICHOLAS	PA1	981113
CLARK	JOSEPH	LCDR	981225
CLEMENTSON	CONRAD	CWO4	981205
COURTNEY	DONALD	EM3	981103
CROCKETT	SAMUEL	AECM	981201
DAVENPORT	RAYMOND	SK1	981201
DAVIS	LARRY	MK1	981201
DAVIS	RICHARD	CDR	981115
DEAN	MARY	SKCS	990101
DENNIS	ROBERT	CWO3	981201
DENO	STANFORD	CDR	990101
DUGGS	EDWARD	LTJG	981130
EAGAR	STEVENS	BMCS	981111
EDENFIELD	JAMES	BM1	990101
ELFRING	FRANCIS	LCDR	990101
ELMASIAN	RICHARD	EMCS	981201
FLOOD	MARIEELENE	SK1	981201
FLOWERS	JAMES	GM2	981019
FORTE	RONALD	ETC	990101
GAFFNEY	GERALD	BM1	981101
GAGER	RICHARD	BMC	981201
GALLAGHER	THOMAS	CDR	981115
GELLER	GEORGE	CAPT	981226
GIMELLI	EUGENE	YNCM	981113
GOLDBERG	ALLAN	CDR	981121
GOOLSBY	WAYNE	BM1	990101
GRAHAM	SCOTT	BM1	981201

GRANDINETTI	GREGORY	FS1	981201
HARLAN	TIM	MK2	990101
HARMON	FREDERICK	CWO4	981201
HAYDIS	RICHARD	ET1	981201
HESTER	JAMES	MK3	981201
HINOJOSA	REYNALDO	DCC	990101
HOARD	DAVID	LCDR	990101
HODGES	DONALD	CWO2	981201
HOFFMANN	KARL	YNCS	990101
HOGLUND	ROBERT	BM1	981201
HOOD	DAVID	BMC	990101
HOOKE	CONNIE	AD2	981201
HORTON	GEORGE	BMC	990101
IWASYSZYN	JOSEPH	YN1	981119
JANI	MARK	BMC	981201
JARRAD	MICHAEL	SK1	981201
JEROME	ROCKY	EM1	990101
JONES	MARGARET	SK1	981201
JUAREZ	GIONE	FSC	981201
KEENER	VINT	AE1	981201
KIDDER	ROBERT	EMCM	990101
KIEROL	DONALD	PSC	981225
KJELDGAARD	MICHAEL	MKC	981201
KONDRACKI	MICHAEL	AM1	981201
KYVIK	ERIC	BMC	990101
LANDER	JOHN	ET1	981224
LATHBURY	JEFFREY	BM1	990101
LAUGHLIN	FREDERIC	SK1	981221
LELIS	ARTHUR	CWO2	990101
LEMON	SHERI	QM1	981206
LEONARD	EDWARD	PSCS	981110
LIEBOWITZ	STUART	BM2	990101
LINDLEY	JOHN	CDR	981201
LIPPY	JOSEPH	PS1	981219
MALES	KEVIN	QM1	981201
MANLANGIT	RUBEN	AM2	981201
MANNING	CHRISTOPHER	MKC	990101
MARTIN	ERNEST	EM1	981122
MARTIN	RAYMOND	CWO4	981201
MARTINEZ	MAURO	CDR	981221
MASON	MELISSA	FS1	990101
MCGINNIS	GLENN	AD1	990101
MCLEAN	ADAM	SN	981114
MEKOTA	PATRICIA	SK1	981227
METCALFE	EDWARD	BM1	981201
METOYER	MARK	LCDR	990101
METZGER	WILLIAM	LCDR	981105
MILLER	MYRA	SK1	981218
MILLER	ROBERT	ATC	990101
MONTOYA	TONY	AECS	981201
MORENO	VICTOR	YN2	981128
MORILON	LOWELL	MK1	981101
NAUMANN	MARSHALL	DC1	981201
NETTLES	CHRIS	LCDR	981201
NOONAN	JAMES	TTCS	981201
OAKES	RICHARD	DCC	981201
OAKLEY	RICHARD	GMCS	990101
OEST	DARYL	YNC	981201
PADGETT	WAYNE	LCDR	981126
PARKS	THOMAS	MKC	990101
PATCHA	ROBERT	CDR	981124

PEEL	EDWARD	CAPT	981127
PEEPLES	LONNIE	DCC	981201
PELZER	MICHAEL	ET1	981201
PHILLIPS	WALTER	QM2	990101
PLUNK	JAMES	MKC	990101
POUNDSTONE	KATHERINE	SA	981122
PRELI	ROBERT	QMCM	990101
PRESLEY	CLARK	DC2	981201
PRINCE	BILLIE	CWO2	981201
PRITCHETT	MARTIN	BM1	990101
RAMSEY	ROBERT	LCDR	981201
RHOADES	JOHN	QM1	990101
ROBERTS	KENNETH	ASMCM	981202
ROBINSON	JIMMY	CWO4	981201
RODRIGUES	RAYMOND	SK2	981102
RUBLE	DANIEL	ET1	981122
SCHAFFRON	MARK	YN1	981201
SCHORN	KEVIN	AEC	990101
SCHUTT	SCOTT	SN	981116
SEAMAN	STEPHEN	ADC	990101
SEIPP	FRANK	MKCM	981201
SHAW	MICHAEL	MK1	981201
SHAYLOR	MILES	AE1	990101
SHELLEY	CHARLES	TC1	981203
SHERMAN	GAIL	PS1	981107
SKOG	ROBERT	CWO4	981201
SMITH	MARK	SK1	981201
STEAD	THOMAS	LCDR	980928
STILLIONS	WILLIAM	GMC	990101
STOTT	STEPHEN	LCDR	981201
STRAIN	JOHN	BM1	990101
STROMSTEDT	WILLIAM	LCDR	981217
SWANIGAN	EDWIN	CWO3	981201
TAYLOR	BENNY	BMC	990101
TAYLOR	DAVID	LT	981201
THOMPSON	LONNIE	MK1	981110
TRAVIS	JOHN	AM3	981201
TURNER	JEFFREY	AE2	981201
TWOMEY	STEPHEN	MKCS	981201
WALL	BOBBY	YN2	981201
WARDLE	WALTER	PSCM	981119
WARREN	DEAN	MK1	981201
WARREN	JAMES	CWO4	981202
WAUGH	MICHAEL	BMC	981201
WEBBER	ROBERT	CWO4	981201
WEBER	WILLIAM	MK1	981112
WELLENHOFFER	BRIAN	TCCS	981201
WELLS	DONALD	AE2	990101
WERTZ	WAYNE	QM1	990101
WHITFIELD	BEVELYN	YNC	981201
WILLIAMS	CONNIE	YN1	981201
WILSON	ROBERT	LT	990101
WILSON	WILLIAM	MKC	981201
WILSON	WILLIAM	MK1	990101
WORKMAN	GEORGE	BMC	981201
ZAMMIT	CHARLES	CAPT	981116



LAST NAME	FIRST NAME	RANK	DATE OF DEATH	CITY	STATE
ANDERSON	MILTON	ENC	981207	OLD TOWN	ME
BEATON	ARTHUR	CWO2	980521	CARSON CITY	NV
BENNER	THOMAS	SS1	990108	CHAMBERBURG	PA
BLYTHE	JAMES	LT	981231	GERMANTOWN	MD
BOJARSKI	HARRY	RMC	981108	GOORRICH	MI
BROWN	EDWARD	ENCM	990106	BON WIER	TX
BRUNK	JULIUS	CDR	981231	SUN CITY CTR	FL
BUCK	RALPH	CDR	981226	PORTLAND	OR
BURHORST	PAUL	CAPT	981208	NAPLES	FL
CABRAL	FRANK	LCDR	981205	PORTSMOUTH	RI
CAMPAGNA	FRANK	CWO4	990110	MIDDLETOWN	RI
CHAN	JAIME	SSC	981220	SWANSEA	MA
CHOUNER	JACK	CWO4	981226	ST LOUIS	MO
COPELAND	WILLIAM	CWO2	981222	OGLESBY	TX
CULBERTSON	JAMES	CAPT	981208	LOMPOC	CA
CUTCHIN	ARTHUR	LT	981204	SACRAMENTO	CA
DAWICKI	ROBERT	EMCM	990104	TROY	PA
DEBOLD	ALTON	CWO3	980105	MIDDLETOWN	MD
DEPAUL	LAVERNE	HS1	981024	ROCHESTER	NY
DEVENS	LEE	CDR	981222	POINT ARENA	CA
DONAHUE	JOSEPH	ENC	980512	OWLS HEAD	ME
DONALDSON	RICHARD	CAPT	981228	LAGUNA BEACH	CA
ELLIS	GEORGE	CDR	981221	MOBILE	AL
ENTREKIN	J	AD1	981202	SAUCIER	MS
FAVERO	MILIO	GMC	981111	RIVERSIDE	CA
FELTON	WALTER	CDR	990117	SEATTLE	WA
FISHER	GERALD	MMC	981207	FREDERICKSBURG	VA
GALE	GEORGE	AMCS	981130	GRANITE SHOALS	TX
GALL	ERNEST	LT	981129	OAKTON	VA
GOODWIN	WILLIAM	ALC	990103	PORT ANGELES	WA
GRACE	KENNETH	ETCS	990105	THOMASTON	ME
GRIFFIN	HARRY	CWO2	990115	STANFIELD	NC
HANSON	WALTER	CWO2	981215	AUGUSTA	ME
HARENZA	MICHAEL	BM1	981112	GALAX	VA
HAWN	MELVIN	TTC	981209	FARMINGTON	MO
HILTON	HOWARD	WO1	981213	AUGUSTA	ME
HUSSEY	WALTER	MMC	981205	FILMORE	NY
JOHNSON	LENNOX	LCDR	981218	GRN COVE SPRING	FL
JOHNSON	ROLAND	LT	981220	LAKELAND	FL
JUSTRABO	ALWYN	CAPT	981105	NEW ORLEANS	LA
KIELY	EARL	CS1	981122	AVON LAKE	OH
KLINEKOLE	GEORGE	GMCS	981207	MESCALERO	NM
LARSON	GORDON	BMCM	990101	OAKLAND	OR
LAYTON	KENNETH	YNC	990112	LAKE ELSINORE	CA
LEE	JOHN	CWO2	981125	VANCOUVER	WA
LINCOLN	PHILIP	CDR	981226	KIRKWOOD	MO
LYVER	FRANCIS	BMCS	981229	TEWKSBURY	MA
MAYO	MAX	BMC	990102	EVANSVILLE	IN
MCGILLY	JOHN	CWO3	981225	UNITY	ME
MELLBERG	ALF	MMC	981210	HUNTSVILLE	AL
MENGE	GEORGE	CWO3	981121	BONITA SPRINGS	FL
MILLER	DENNIS	DCCM	981123	PISGAH FORREST	NC
MORRIS	NORMAN	EN1	980804	ALVIN	TX
MORRIS	ROBERT	BMC	981119	GOOSE CREEK	SC



NAEGLE	JOHN	CDR	990104	ISSAQUAH	WA
NEAVES	JOSEPH	PSCM	981219	SAN ANTONIO	TX
NORTON	HAROLD	EN1	981103	FLUSHING	NY
NORTON	LYMAN	LCDR	981230	SAN CLEMENTE	CA
ONDRAKO	WILLIAM	BMC	981210	SPRINGHILL	FL
ORAM	WILLIAM	PS3	981227	W ROXBURY	MA
PANKOWITZ	FRANK	ENC	981112	WHITESTONE	NY
PAPANDREA	PATSY	BMC	981206	SOMERVILLE	MA
PECKICONIS	STEPHEN	CWO4	981215	CAPE MAY	NJ
PERRY	RAYMOND	CAPT	981220	SALEM	MA
PHILLIPS	WILSON	EN1	981225	SPOKANE	WA
POLLARDO	JOSEPH	SKCM	981218	BOTHELL	WA
RANDALL	ROBERT	AD1	990113	PINELLAS PARK	FL
RENNER	WAYNE	EMC	981230	EASTON	PA
RICH	EARLE	BMC	981123	SANDWICH	MA
ROBERTSON	WALTER	AE1	990105	MARTINEZ	GA
SAFEY	DAVID	MKC	990104	FLUSHING	NY
SISON	FLORENCIO	CSC	981119	GULFPORT	MS
TANGUAY	JOSEPH	CAPT	981130	P C BEACH	FL
THEEN	GEORGE	MST1	981211	HASTINGS	NY
THOMAS	JUNIUS	YN2	981120	BAYOU GOULA	LA
THOMAS	LEONARD	CWO2	981022	LAKELAND	FL
THOMAS	WILLIAM	CWO4	981207	RIXEYVILLE	VA
THOMPSON	BOBBY	CWO3	981211	SPRINGTOWN	TX
TOMS	CECIL	BMC	990112	BOULDER CITY	NV
TONNESEN	RALPH	CWO4	981112	RHINEBECK	NY
WALSH	FRANCIS	CDR	981126	ARLINGTON	VA
WILLIAMS	JOHN	BM2	980824	COHASSET	MA

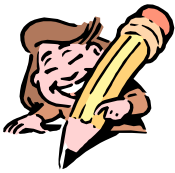
## Dependent TAPS

### Name

### Date

<b>Jean Banner</b> , wife of CWO3 Harold W. Banner USCG, Retired (deceased)	22 December 1998
<b>Virginia Ruth (Bo) Bresnahan</b> , wife of ALC Richard T. Bresnahan USCG, Retired	13 September 1998
<b>Bernice A Konicki</b> , wife of SKC Victor Konicki, Jr. USCG, Retired	4 May 1998
<b>Betty Cannon Manning</b> , wife of PO1 Bobby Ronald Manning USCG, Retired	17 June 1998
<b>Mary T. Oakley</b> , wife of CAPT George L. Oakley USCG, Retired	27 January 1999
<b>Barbara A. Oglesby</b> , wife of CWO3 Donald J. Oglesby USCG, Retired	12 September 1998
<b>Arlene L. Vachula</b> , wife of CWO3 Robert G. Vachula USCG, Retired	26 December 1998

**\*\* PLEASE NOTE:** Out of respect for your family's privacy, the Retiree Newsletter lists your loved ones name only at the family's specific request. If you would like your loved one listed in the Dependent TAPS section, please be sure to write, call or fax the Retiree Newsletter directly with your request. Please include your loved ones name (including nickname if you would like it to appear); date of death; relationship to the retiree; retirees name, social security number, rank and retirement status (ie Reserve, Regular). Also include a point of contact name; full address and telephone number in case we have any questions. Direct your request to: The Retiree Newsletter Editor, USCG HRSIC (RAS), 444 SE Quincy Street, Topeka KS 66683-3591; fax to (785) 295-2639/2640; or email to "rklein@hrsic.uscg.mil". As always, you may phone our toll-free number (1-800-772-8724) and ask for the Newsletter Editor or call the Editor directly at commercial (785) 357-3429.



## Notes from the Editor

The story, "Being Prepared: Helping your survivors deal with your personal affairs after your death" by CAPT Kirk Greiner USCG, Retired on page 3 of the January 1999 issue of the Retiree Newsletter drew an overwhelming response! The following information is provided so that you may obtain the forms and documents that CAPT Greiner mentioned in putting your personal affairs in order:

- ♦ The VA Form 21-534 – Application for VA benefits, can be obtained from the Department of Veterans Affairs. Their toll free telephone number is located in the Directory Assistance section of your Retiree Newsletter on page 31.
- ♦ A copy of the CG HRSIC-1884 – Application for annuity under the Survivor Benefit Plan (SBP) and/or Retired Serviceman's Family Protection Plan (RSFPP) is included in this newsletter on pages 25 – 26.
- ♦ A copy of the CG HRSIC-3867 – Application for final retired pay by designated beneficiary, is included in this newsletter on pages 23 – 24.
- ♦ The "Survivor Benefit Plan Election Certificate – DD 1882" referenced in the article on page 3, is your copy of the form that you made your SBP/RSFPP elections on. This can be various different form numbers (DD-1881, DD-1882, DD-1883), dependent on the plan you are in and your retirement status (ie regular, reserve, disability).
- ♦ To obtain a copy of your or your spouses DD-214, you must contact the National Personnel Rec-

ords Center in St. Louis, Missouri. Their address and telephone number are listed in the Directory Assistance section of your newsletter on page 31.

- ♦ For information on Wills, Trusts, Titles, and Powers of Attorney, you should contact your personal attorney for assistance.

In January's "Notes from the Editor" I published a letter from CAPT Allan Brier of the CGC Eastwind Association. I received the following response from another reader which I thought might be of interest:

*"Regarding the letter from Allan K. Brier, in the 'Notes from the Editor' column – unless my memory has failed me, low these many years – the casualties from the Eastwind disaster were not thirteen Chief Petty Officers, but twelve chiefs and a seaman whose name was Williams, if I recall correctly.*

*This is not to disparage Capt Brier's commendable letter commemorating the 50th anniversary of the tragedy, but to honor the memory of Williams.*

*I sincerely apologize if I have misnamed the seaman, but I am sure that you can correct the error if so warranted.*

*Having been a crew-member aboard Eastwind on that fateful morning, I just wanted to set the record straight."*

Arnold L. Palmacci  
QMCM, USCG, Retired  
Vero Beach, FL

**And more on the Eastwind...**  
George T. Johns Jr, MKC USCG,  
Retired of St. Louis, MO writes:

*"In reference to members of the CGC Eastwind concerning the unfortunate collision at sea on 19 January 1949 at 0435 AM, between the Eastwind and Gulfstream:*

*I was on the Eastwind at the time and had just gotten off my mid to 4 watch. My heart and prayers for my shipmates goes out to them. I have*

*never forgotten that accident and just wanted you to know."*

**\*\*An added note on the Eastwind disaster:**

The memorial printed in January's newsletter seemed to generate quite a bit of interest. I contacted the Old Navy/Maritime Records Section at the National Archives in Washington DC. A special thanks to Rick Peuser there who was kind enough to sift through the 4 boxes of records from the Marine Board Investigation files to give me the following names of crewmembers from the Eastwind that perished:

CSC William F. Barnett  
HMCHarry F. Brown  
BMCDonald W. Bryson  
ENC Ewell Busby  
SA Stanislaus Coindreau  
EN3 Robert E. Connors  
DCC Louis Cywinski  
QMCPeter A. Everett  
SKCKenneth S. King  
RMCAAnthony G. Machansky  
ENCRupert D. Midgette  
SAAlbert Williams  
FAJohn V. Zerr

(The names were obtained from the death certificates on file. The ranks were obtained from their final pay records. Apparently, all of the above died on the Eastwind that day except SA Coindreau who was transported to the military hospital on Staten Island, NY and died from his injuries on 25 January 1949, 6 days later.)

**Bert Stanley, YNC, USCG, Retired of Hubert, NC wrote requesting the following information be re-published:**

*"In my Retiree Newsletter (Oct '95) appeared an article entitled 'Retiree license plates', which read:*

**The State of North Carolina is producing special vehicle license plates for retirees from each mili-**

## Notes from the Editor (continued)

tary service. In order for the state to start selling the plates, they must have 300 applications from the particular branch of service. All services have qualified for the license plates except the Coast Guard. If you are a retired Coast Guardsman residing in North Carolina and would like to have the special license plates, please call the State Department of Motor Vehicles and have your name listed.'

I sent in my application and money to obtain a license plate in 1995. I contacted the Department of Motor Vehicles in Jan '99 and to date only 50 people have ordered the Coast Guard license plates.

This information needs to be emphasized again. There are more than 50 retired Coast Guardsman in North Carolina, I am sure, that would like to have a Coast Guard license plate."

In the January '99 issue on the bottom of page 22, I ran an article on "Vacationing in Europe". The email address listed was incomplete. I apologize for missing it! The complete email address for AFRC Europe Vacation Center is: "vacation@afrc.garmisch.army.mil". They also have a website at: "www.afrc europe.com" for additional information.

You can email the editor at:

"rklein@hrrsic.uscg.mil"

with your submission for the newsletter!

## Retiree Council Notes

This month, CAPT A.D. Grantham, of the 13th District Retiree Council, provided the following information on the formula for success of the districts council.

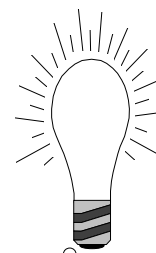
What has helped to make this District's Retiree Council program a success? There are many factors that have allowed the 13th District to have an outstanding Retiree Council program. The biggest factor; it's people, both retired and still on active duty. We've been very lucky having one District Commander after another who has actively supported us from the beginning, and has directed their staff to provide the support necessary to help execute our program. Our council consists of retired members of all ranks from throughout the District, including the widow of a retired member who also brings a unique perspective to the council. The council should be made up of members who are actively recruited by the District staff and those that voluntarily make themselves available to serve. We have found that a limit on length of service or on numbers of members is counterproductive. As long as a member is active and productive, let him or her serve. We go out of our way to recruit retirees who can add their outside work status to the Council. We've had two VA Service Officers serving for years who provide the input for what's going on in the VA and its impacts on retirees. Actively recruit reservists, especially those "gray area" members who are retired but less than 60 and therefore not carried on an annuitant list. The same for widows who don't receive

SBP payments. They are also dropped from the Coast Guard's rolls upon the death of their retiree spouse. Being all inclusive allows the Council to be more attuned to the needs of the community they are trying to represent and serve.

We publish and distribute a periodic newsletter for our retirees to keep them aware of what is happening in our local area. We publish a retiree directory so that retirees know where their contemporaries are located. We hold at least one retirees general meeting per year, organizing guest speakers on subjects the

Council feels will be of interest to the retirees and their families. These are just some of the services we strive to provide through our council.

It's not an easy task to establish and keep a council active, but it's well worth the effort.



**Don't Forget:**  
**Public Law 105-85**  
**provides for a one-**  
**year period, begin-**  
**ning two years after**  
**the commencement**  
**of retired pay during**  
**which SBP partici-**  
**pants may choose to**  
**discontinue partici-**  
**pation in SBP. If you**  
**would like further in-**  
**formation please**  
**contact us at**  
**1-800-772-8724**

**INSTRUCTIONS FOR COMPLETION OF HRSIC FORM 3867****APPLYING FOR FINAL RETIRED PAY DUE  
(DESIGNATED BENEFICIARY)**

1. **Beneficiaries.** When a retired member dies, retired pay for the month of death is paid to the person(s) living on the date of the member's death, in this order of precedence:

- a. Beneficiary designated by the member in writing to the Coast Guard prior to death.
- b. Surviving spouse.
- c. Children and their descendants, by representation.
- d. Father and mother in equal parts or, if either is deceased, the survivor.
- e. Legal representative.
- f. Person entitled under the law of the domicile of the retiree.
- g. Person paying the funeral expenses.

2. **Applying for Final Retired Pay Due.** You must provide the following documentation to apply for final pay due.

- a. A completed HRSIC Form 3867 (form attached). Sign the form in the presence of two witnesses who must sign and date the form.
- b. **Copy of death certificate.**

3. **Filing Application.** Send completed form to:

**COMMANDING OFFICER (RAS)  
USCG HUMAN RESOURCES  
SERVICE & INFORMATION CENTER  
444 SE QUINCY ST  
TOPEKA KS 66683-3591**

4. **Payment.** You can expect to receive your payment for final retired pay due within 45 days after we receive your claim form and supporting documents.

Attachments: HRSIC Form 3867

DEPARTMENT OF TRANSPORTATION  
U.S. COAST GUARD  
CG HRSIC-3867 (Rev. 9-97)

CLAIM FOR FINAL RETIRED PAY  
BY DESIGNATED BENEFICIARY

1. NAME, RANK, AND SOCIAL SECURITY NUMBER OF  
DECEASED RETIREE

2. DATE OF RETIREE'S DEATH

3. NAME OF CLAIMANT  
(Last, First, Middle Initial)

4. SOCIAL SECURITY NUMBER OF  
CLAIMANT

5. ADDRESS AND TELEPHONE NUMBER OF CLAIMANT

6. RELATIONSHIP OF CLAIMANT TO  
DECEASED

7. I, the above named claimant, certify that all statements on this claim are true to the best of my knowledge, information, and belief. I certify that no evidence to the settlement of this claim has been suppressed or withheld. I understand that any false statement on this claim, or any misrepresentation this relative thereto, is a violation of the law punishable by fine of not more than \$10,000 or imprisonment of not more than 10 years or both (32 Stat. 197; 18 U.S.C. 10).

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SIGNATURE OF CLAIMANT

TWO WITNESSES ARE REQUIRED

8. We certify that we are well acquainted with the above claimant(s) and that the signature of the claimant was affixed in our presence

\_\_\_\_\_  
SIGNATURE OF WITNESS

\_\_\_\_\_  
SIGNATURE OF WITNESS

\_\_\_\_\_  
ADDRESS OF WITNESS

\_\_\_\_\_  
ADDRESS OF WITNESS

\_\_\_\_\_  
TELEPHONE NUMBER OF WITNESS

\_\_\_\_\_  
TELEPHONE NUMBER OF WITNESS

\_\_\_\_\_  
DATE OF SIGNATURE

\_\_\_\_\_  
DATE OF SIGNATURE



Reverse of CG HRSIC-3867 (Rev. 9-97)

PRIVACY ACT STATEMENT

In accordance with 5 U.S.C. 552a(e) (3), the following information is provided to you when supplying personal information to the U.S. Coast Guard:

1. AUTHORITY which authorizes the solicitation of the information is 10 U.S.C. Section 2771.
2. PRINCIPAL PURPOSE(S) for which information is intended to be used:  
To allow eligible claimants to apply for arrears of retired pay.
3. The ROUTINE USES which may be made of the information: Used to compute pay due beneficiaries of deceased retired members.
4. Whether or not DISCLOSURE of such information is mandatory or voluntary (Required by law or optional) and the effects on the individual, if any, of not providing all or any part of the requested information: Disclosure of this information is voluntary but without disclosure, a beneficiary may not receive the final pay due the deceased retiree.

XX  
XX

CERTIFICATION FOR PAYMENT OF CLAIM  
(to be completed by Coast Guard)

I certify that the records of the U.S. Coast Guard show that the beneficiary named above is designated to receive any unpaid arrears of retired pay that is due the decedent, and the requirements of applicable law and regulations have be satisfied.

\_\_\_\_\_  
TYPED NAME AND TITLE

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

Department of Transportation U.S. Coast Guard CG HRSIC-1884 (Rev. 9-97 ) PART A. DECEASED MEMBER INFORMATION		APPLICATION FOR ANNUITY UNDER THE SURVIVOR BENEFIT PLAN (SBP) AND/OR RETIRED SERVICEMAN'S FAMILY PROTECTION PLAN (RSFPP)	
1. NAME (Last, first, middle initial )	2. SOCIAL SECURITY NUMBER	3. DATE OF DEATH	
PART B. SURVIVING SPOUSE INFORMATION 4. NAME (Last, first, middle initial )		5. SOCIAL SECURITY NUMBER	6. DATE OF BIRTH
7. WERE YOU LEGALLY MARRIED TO THE DECEASED AT TIME OF DEATH? [ ] YES [ ] NO		8. DATE AND PLACE OF MARRIAGE	
9. WHAT IS YOUR COUNTRY OF CITIZENSHIP?		10. CORRESPONDENCE MAILING ADDRESS AND TELEPHONE NUMBER	
11. HAVE YOU APPLIED, OR DO YOU INTEND TO APPLY , FOR DEPENDENCY INDEMNITY COMPENSATION (DIC ) FROM THE DEPARTMENT OF VETERANS AFFAIRS (VA)? [ ] YES [ ] NO	12. IF YOU ANSWERED YES TO QUESTION #11, SUPPLY: VA CLAIM NUMBER _____ MONTHLY DIC AMOUNT AWARDED _____ ADDRESS OF VA OFFICE _____ HANDLING ACCOUNT: _____		
13. ARE YOU RECEIVING ANY OTHER SURVIVOR ANNUITY OF ANY KIND ON THE RECORD OF THIS OR ANY OTHER DECEASED MILITARY MEMBER? [ ] YES [ ] NO	14. IF YOU ANSWERED YES TO QUESTION #13, SUPPLY: TYPE OF BENEFIT: _____ MONTHLY AMOUNT _____ NAME AND SOCIAL SECURITY NUMBER _____ OF SUCH DECEASED MEMBER: _____		
PART C. ELIGIBLE CHILDREN OF THE DECEASED (List only unmarried children under age 23 on incapable of self-support.)			
15. NAME OF CHILD	16. SSN OF CHILD	17. BIRTH DATE	18. MARITAL STATUS
			19. FULL-TIME STUDENT
			20. NAME, ADDRESS, RELATIONSHIP, AND TELEPHONE NUMBER OF CUSTODIAN
PART D. FORMER SPOUSE OR INSURABLE INTEREST PERSON INFORMATION (To be completed only if you are designated by the deceased retired member to receive an annuity as a former spouse or as an individual with an insurable interest in the deceased.)			
21. NAME (Last, first, middle initial )	22. SOCIAL SECURITY NUMBER	23. DATE OF BIRTH	24. MARITAL STATUS
			25. CORRESPONDENCE MAILING ADDRESS AND PHONE NUMBER

Reverse of CG HRSIC 1884 (Rev. 6-98)

## PART E. GUARDIAN/CUSTODIAN INFORMATION

26. HAS A GUARDIAN BEEN APPOINTED BY A COURT  
FOR ANY OF THE ABOVE-NAMED SURVIVORS?

[ ] YES [ ] NO

IF ONE HAS NOT BEEN APPOINTED, DO YOU  
ANTICIPATE THAT ONE WILL BE APPOINTED?

[ ] YES [ ] NO

27. IF YOU ANSWERED YES TO QUESTION #26, SUPPLY A COPY OF THE  
GUARDIANSHIP PAPERS IF THERE ARE ANY. ALSO SUPPLY THE BELOW  
INFORMATION:

NAME OF BENEFICIARY

NAME OF GUARDIAN

ADDRESS OF GUARDIAN

PHONE # OF GUARDIAN

## PART F. AFFIDAVIT AND SIGNATURE

28. I CERTIFY THAT ALL STATEMENTS ON THIS CLAIM ARE TRUE TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF. I

CERTIFY THAT NO EVIDENCE TO THE SETTLEMENT OF THIS CLAIM HAS BEEN SUPPRESSED OR WITHHELD. I UNDERSTAND THAT ANY  
FALSE STATEMENT ON THIS CLAIM, OR ANY MISREPRESENTATION RELATIVE THERETO, IS A VIOLATION OF THE LAW PUNISHABLE  
BY A FINE OF NOT MORE THAN \$10,000 OR IMPRISONMENT OF NOT MORE THAN 10 YEARS OR BOTH (32 STAT. 197 ; 18 U.S.C 10)

IF SUBMITTING THIS SBP APPLICATION AS A SURVIVING SPOUSE, I UNDERSTAND:

(A) MY SBP ANNUITY WILL BE ESTABLISHED IN FULL IF MY ENTITLEMENT TO DEPENDENCY INDEMNITY COMPENSATION (DIC)

FROM THE DEPARTMENT OF VETERANS AFFAIRS (VA) IS NOT KNOWN BY THE COAST GUARD.

(B) UNDER THE LAW, I CANNOT RECEIVE BOTH SBP AND DIC IN FULL AMOUNTS FROM THE SAME RETIREE.

(C) I AM ONLY ENTITLED TO THE AMOUNT OF THE SBP ANNUITY THAT EXCEEDS THE DIC SPOUSE PAYMENT THAT MAY BE PAYABLE  
IMMEDIATELY OF THE AMOUNT OF DIC AWARDED AND THE DATE IT WAS EFFECTIVE.

(D) IF ANY OVERPAYMENTS OF SBP BENEFITS OCCUR, MY SIGNATURE ON THIS STATEMENT AUTHORIZES THE VA TO REPAY THE  
COAST GUARD THE AMOUNT OF THE OVERPAYMENT FROM THE DIC PAYMENTS TO WHICH I MAY BECOME ENTITLED.

DATE

SIGNATURE OF APPLICANT

SIGNATURE OF WITNESS

ADDRESS AND PHONE # OF WITNESS

SIGNATURE OF WITNESS

ADDRESS AND PHONE # OF WITNESS

PRIVACY ACT STATEMENT : AUTHORITY: Public Law 92-425.

PURPOSE/USE : To establish and compute pay of annuitants.

Disclosure: Disclosure of this information is voluntary, but without disclosure, a beneficiary  
will not be paid an annuity.

## CERTIFICATION FOR PAYMENT OF ANNUITY (to be completed by Coast Guard)

[ ] I certify that the records of the U.S. Coast Guard show that each beneficiary named above is eligible to receive  
an annuity, and that the requirements of applicable law and regulations have been satisfied.

TYPED NAME AND TITLE

SIGNATURE

DATE

## **1999 COAST GUARD MUTUAL ASSISTANCE** **FUND-RAISING CAMPAIGN** **"We Look After Our Own"**

**In 1999, Coast Guard Mutual Assistance celebrates 75 years of helping the men and women of the United States Coast Guard Family!**

Originally established in 1924 by the wives of several Coast Guard officers as the **League of Coast Guard Women**, the organization was to "minister to the general welfare of the commissioned officers, warrant officers, enlisted men and civilian employees of the Coast Guard and their immediate families." The League ended its first year of operation with a net worth of \$1,133.87, most of which was raised by annual dues of \$2.00. In 1941, **Coast Guard Welfare** was formally established and took over the mission from the League, providing \$11,500 in assistance to our members that year. In 1979, the name was changed to **Coast Guard Mutual Assistance** and \$1,500,000 in loans and grants was provided to our members. As a result of growth, CGMA became incorporated in the State of Virginia on 01 January 1998, thereby providing liability protection for the fund and its administrators.

Every segment of the our Coast Guard Family, including Active Duty and Retired military personnel, Civilian Employees, Reservists, Auxiliarists, and their families, has benefited from CGMA assistance in their time of financial need. **During 1998, a record \$6,000,000 in financial assistance was provided to over 8,000 of our members in the form of grants and loans.**

**Now CGMA needs your help!** CGMA was able to be there for so many people because of past contributions from our members and positive returns on our investments. However, as our members' financial needs have increased dramatically in recent years, including a 15% increase during 1998, contributions to CGMA for the same period either dropped or remained stagnant. As a result, combined annual contributions and returns on investments have not kept pace with program costs and the increasing needs of our members. For the past two years it was necessary for CGMA to reduce its investment account to fund these deficits, thereby potentially reducing future returns, which in turn could cause a reduction in programs and assistance.

Rather than eliminate or reduce programs, CGMA would like to continue meeting our members' current needs and provide them with further assistance by expanding current assistance programs and starting new programs. This includes continuing to meet the needs of our Retired Coast Guard members, who are eligible for all of CGMA's assistance programs, as "They Also Serve." During 1998, Retired Coast Guard military members received financial assistance at twice the amount of total contributions they made for the year. This level of assistance can only continue through increased contributions. This is why CGMA asks for your help in the form of generous contributions, especially by starting or increasing payroll allotments.

As in years past, fund-raising campaign brochures will be direct mailed to all Retired Coast Guard military personnel. You are encouraged to complete the Contribution/Allotment Authorization form contained in the brochure and return it in the self-addressed envelope. Unlike other fund-raisers, the CGMA Fund-Raising Campaign is the only fund-raiser that is truly,

**"Coast Guard people, helping Coast Guard people"**



Looking for all former CO's, XPO's, EO's, crewmembers and interested parties of **USCGC Sumac (WLR-311, WAGL-311)** for information and participation in the Sumac's "retirement" scheduled for summer of 1999. Please contact MKC Tim Nass at P.O. Box 174, Collinsville, IL 62234-0174; by phone (314)481-6793; or via email at "t.nass@juno.com".

CWO (Retired) Edgardo B. Cosio would like to hear from friends and former shipmates who are now residing in the Philippines. Please write him at 18 M.H. Del Pilar Street, Taal, Batangas 4208, Philippines or call (043)2142-506.

PSCM (Retired) Dave Malland is looking for EN/MKCM (Retired) Ted Ward who was POIC of Lime Kiln Light Station in 1957-58. His last known location was Aberdeen, Washington. Please call (360)293-0421, evenings.

Donald L. DeBasio would like to be in contact with other CG retirees in the Phoenix, AZ area. Please contact him at 8619 E. San Alfredo Drive, Scottsdale, AZ 85258; by phone at (602) 991-7514.

SKCM Chester W. (Jake) Jacobs would like to hear from old friends. He can be contacted at 116 Timrose Lane, Orangeburg, SC 29115; or phone at (803)534-7790.

CDR (USCGR, retired) Everett Merritt would like to contact former shipmates from USCG Base Galveston, TX (7/59 – 7/62). Particularly LTJG Vernon Bartels, USCGR, from the Chicago, IL area and LTJG Thomas Otto, USCGR, from the Ponte Vedra (Jacksonville), FL area. Both of whom may not have continued in the USCGR beyond the six year reserve unit obligation, which would have ended in 1968. Others I would love to contact are George Barnum, YN, USCG – last known as YN2 in 1962 and Roy Record, YNC, USCG – also last known in 1962. Please write Everett Merritt, CDR USCGR, retired at 120 Sugar Pine Drive, Pinehurst, NC or call (910)295-0439. From 7/1 – 9/1 each year contact me at 77 West Lake Road, Branchport, NY 14418 or call (315)595-2268.

The Gaspar's (a former CG family) are trying to locate Malcolm (Mac) Sheldon, who was also in the CG for a reunion at Block Island School, RI scheduled for June 1999. If you know of his possible location could you please contact Barbara Gaspar at (401)273-5906.

## W anted: Oil spill response information

The United States Environmental Protection Agency (EPA) is interested in obtaining information about an oil spill that occurred in Mako, North Carolina in 1976. The Coast Guard was involved in investigating and cleaning up the spill. The size of the spill was approximately 20,000 gallons. The spill contaminated two



nearby creeks known as "Chinnis Branch" and "Rattlesnake Branch". The oil spilled from a private oil disposal facility operated by Mr. Otto Skipper. EPA is interested in obtaining documents and interviewing people who have direct knowledge of the spill or cleanup. If you have any information that may be relevant to the

EPA's investigation, please contact CDR Ron Kilroy via email at rkilroy@comdt.uscg.mil, or LCDR Bob Schuda via email at rschuda@comdt.uscg.mil. They are also available by phone at (202) 267-6000, and by mail at:

Commandant (G-LEL)  
U.S. Coast Guard Headquarters  
2100 2nd Street, S.W.  
Washington D.C. 20593-0001



## What are they doing now?

### ETC Matthew J. Bezayiff USCG, (retired)

After retiring in September 1992, I settled down in the wine country of Northern California and began my second career as an Electronics Manager for a county office. Then to a Network Administrator position in the same office, where I maintained a 350 node Local Area Network and a 27 node Wide Area Network servicing approximately 30,000 students and their access to the Internet. Since then, I have moved on to a private college where I hold the position of Computer Technology Department Head, where my 6 instructors and I teach computer hardware, structured wiring systems, networking, Novell, and Microsoft operating systems to prepare computer professionals for certification. In my free time you may find me either backpacking the High Sierra's of California, shooting, or just out in my trailer for a weekend. My email address is "mbezayiff@empirecollege.com" or "netguru@ieee.org".

### CAPT C. William Bailey USCG, (retired)

After retirement in 1973, I became Operations Manager for Hvide Marine, Inc., operating two 45,000 ton tank vessels out of Port Everglades, FL. After a year, and having an Unlimited Master Oceans License since 1947, and still liking sea duty even after nine commands of CG seagoing Cutters, I took advantage of a vacancy and went aboard a gasoline coastwise tanker for 8 years, and then 2 years in a chemical carrier running to Russia.

Now being well past the company's retirement age and with eager young Chief Mates nipping at my heels, I took my gold watch and went ashore. In a couple of weeks there was a call for a Master of a Mobil Oil survey vessel. Here it was that I encountered my first Lady Chief Mate. She was terrific, especially in the ultra-precise



navigation required of us in towing a 2 1/2 mile long, \$500,000 instrumented cable on designated paths through crowded oil fields. After a couple of years of this activity, I decided that I had sailed enough so again I went ashore. I then started on a third career as a full time symphony musician! Surely a case of "you can so have your cake and eat it too"!

Truly I was fortunate to have the best of a career whose plan originated back in 1926 when my Dad took a 10-year-old aboard a CG Cutter on visitors day.

You might be interested that the 14-year-old son who I took aboard the EASTWIND in 1968 (and who disappeared into the engine room the minute he came aboard) has, with his older brother, been for over 20 years a licensed Chief Engineer aboard two former Coast Guard Cutters, the PERSEUS and the CALYPSO, converted into 500+ passenger, sightseeing ships in New York. They are proud of their 66 year old vessels with the original Winton engines still running smoothly, truly a monument to CG design and construction!



## Annual Retiree Seminar planned

Once again the Annual Retiree Seminar at the Naval Education & Training Center, Newport, RI rolls around.

This year it will be held in Spruance Hall, Naval War College on 17 April 1999 at 0900.

Retirees of all services, spouses and widows are invited.

The commissary, exchange, vehicle pass office and ID card offices will be open from 1000 to 1400.

Speakers include the CO Naval Ambulatory Care Center (former Naval Hospital) Health Benefits Advisor, VA, area HMO's, Aging 2000, Department of Elderly Affairs, Social Security, Military Coalition in Washington and the Secretary of the Navy's Retiree Council to name a few.

If further information about the seminar is desired, please call QMC Robert J. Perrello USN, (retired) at (401) 841-4089.



## From ISC Portsmouth... ID Procedure change

In the past, Integrated Support Command Portsmouth was willing to assist our Retiree community by issuing Dependent ID cards on a one for one basis. The standard procedure for issuing Dependent ID cards is, and has always been, for the sponsor to sign the DD Form 1172 for legitimate beneficiaries. We apologize for any inconvenience this may cause our Retiree community in complying with the standard, but we must comply with regulations in issuing ID cards for security and accountability concerns. Your cooperation is greatly appreciated as we continue to serve you.

## DIRECTORY ASSISTANCE

### Retired Pay & Annuities



#### For information on:

- PAY
- DIRECT DEPOSIT
- CHANGE OF ADDRESS FOR RASOMI
- CHANGE OF ADDRESS FOR NEWSLETTER

#### Write or Call us at:

Commanding Officer (RAS)  
Coast Guard Human Resources  
Service & Information Center  
444 SE Quincy Street  
Topeka, KS 66683-3591



Toll Free 1-800-772-8724  
Commercial (785)357-3415  
FAX (785)295-2639



#### You must write or FAX us for requests to:

- Change allotments
- Start allotments
- Stop allotments
- Change SITW
- Change FITW

#### Write to:

Commanding Officer (RAS)  
Coast Guard Human Resources  
Service & Information Center  
444 SE Quincy Street  
Topeka, KS 66683-3591



Or FAX to:  
(785)295-2639

### Report of Death



To report the death of a Coast Guard, NOAA retiree/  
annuitant, or a Lighthousekeeper call: 1-800-772-8724

#### Or write:

Commanding Officer(RAS)  
Coast Guard Human Resources  
Service & Information Center  
444 SE Quincy Street  
Topeka, KS 66683-3591



Commercial: (785)357-3415  
FAX: (785)295-2639



### DEERS



#### Call your local ID issuing office or call:

Toll Free: 1-800-538-9552  
In CA: 1-800-334-4162  
In AK & HI: 1-800-527-5602

**TRICARE/Medical Benefits**

**Call your CG Health Benefits Advisor at:**



**1-800-942-2422  
TDD: 1-800-327-5273**

**Active Duty Pay**

**For information on Severance Pay, Separation Pay, Disability Severance Pay, LES's, IRS Form W-2, while on Active Duty prior to separation/retirement call or write:**

**Commercial: (785)357-3550**



**Commanding Officer (SES)  
Coast Guard Human Resources  
Service & Information Center  
444 SE Quincy Street  
Topeka, KS 66683-3591**

**Service Records**

**For copies of DD214's, personnel records, medical & dental records, and service medals - requests must be in writing and include complete name, rank, SSN, dates of service and date of birth. Write to:**



**National Personnel Records Center  
9700 Page Boulevard  
St. Louis, MO 63132-5200**

**Commercial: (314)538-4141**

**Social Security**

**For information about Social Security benefits contact your local Social Security Office or call Toll Free:**

**1-800-772-1213**

**VA Benefits**

**For information about available VA benefits contact your local VA office or call Toll Free:**

**General Information 1-800-827-1000  
Insurance Information: 1-800-669-8477  
Headstones: 1-800-697-6947**

**Veteran's Group Life Insurance (VGLI)**

**For information on VGLI coverage costs and renewal options write or call:**

**OSGLI  
213 Washington Street  
Newark, NJ 07102**



**1-800-419-1473**

**Travel Claims**

**For information, call Toll Free: 1-888-872-4885  
Or write: Coast Guard Human Resources  
Service & Information Center (TVL)  
444 SE Quincy Street  
Topeka, KS 66683-3591**



TOPEKA KS 66683-3591

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