



How You Can Help Your Family After Your Death or Incapacitation

A Checklist for a Surviving CSA Retiree Spouse or Domestic Partner

We've created these attached forms to help your family when you, a Retiree Chapter member, may become incapacitated or you have died. While no one wants to think about their mortality, avoiding the subject usually causes needless complications for the surviving spouse or domestic partner, or other family members.

It is not unusual for people to leave instructions for funerals, memorial services and other death-related events. This kind of preparation can help your family avoid difficult decisions at an emotional time.

In addition to general financial information, these forms allow you to also provide information about your status as a CSA retiree. Make sure whomever you appoint to handle your affairs, whether it's your spouse or domestic partner, or a child or a lawyer knows where you keep your important papers including these forms.

If the event of your death, your designee should notify us and the following agencies as soon as possible. Implementation of survivor's benefits cannot begin unless notification takes place.

1) Teacher's Retirement System of the City of New York (TRS)

55 Water Street, NY, NY 10041

(888) 8-NYC-TRS (869-2877)

www.trs.nyc.ny.us

- a) TRS requires an original death certificate
- b) Remember to ask about survivor's benefits
- c) You must return the pension check for the month in which the member died. If the check was deposited directly into an account, TRS will get the money from the bank. TRS will issue a pro-rated check for that month.

2) NYC Office of Labor Relations, retiree benefits

40 Rector St., Third Floor, NY, NY 10006

(212) 306-7600

www.nyc.gov/olr

- a) OLR requires an original death certificate
- b) OLR will contact the current health insurance company. The surviving spouse or domestic partner does not need to.
- c) If the survivor wishes to continue to have NYC health coverage through COBRA, the survivor must apply within 60 days of the death of the covered member. COBRA, Consolidated Omnibus Budget Reconciliation Act, is a federal law that gives families who lose their health benefits the right to choose to continue group health benefits provided by their group health plan for limited periods of time.

3) Social Security Administration

(800) 772-1213 (northeast program center)

Check for local center is you live outside the northeast U.S.

www.ssa.gov

- a) You must call if the deceased received Social Security or Medicare benefits.

4) CSA Retiree Chapter

40 Rector St., 12th Floor, NY, NY 10006

(212) 823-2020

www.csa-nyc.org

- a) If the surviving spouse or domestic partner was a spousal member, s/he may continue his membership and continue to receive supplemental health benefits for as long as s/he remains eligible for CSA Retiree Welfare Fund benefits. You must complete an application.
- b) If the Retiree Chapter member was also a member of a CSA Regional Unit, please contact the local representative.
- c) We request a copy of the death certificate.

5) CSA Retiree Welfare Fund (same address as the Chapter)

(212) 962-6061

www.csawf.org

- a) Inform the Fund of a member's death. Ask for information related to surviving spouse's benefits. A surviving spouse's benefits continue without cost for five years from the date of the member's death.