

PERSONAL AFFAIRS
Talking Paper - Presented at Oct 2009 VCOC Meeting

On behalf of LTC Blair Smith, USA, Ret, I have a few words about Personal Affairs. I attended the Personal Affairs portion of the MOAA Chapter President's Symposium in September in Hershey PA and picked up these tips:

1. The portion of MOAA that handles Personal Affairs is the **Benefit Services Section**.
2. MOAA Policy and Procedures guide maps out Personal Affairs responsibilities (There is a new Policy & Procedures guide).
3. The scope of a chapter's Personal Affairs program depends on the skills and abilities of the committee members, their time and availability and what is already handled in the community. It is up to the chapter to determine how comprehensive the assistance they provide members is.
4. Chapter Personal Affairs Committee should include chaplain, if the chapter has a chaplain, and a surviving spouse. It is ideal to have lawyers and/or tax experts if possible. Many chapters have a one-person committee, though.
5. A list of pre-need contacts - National was given out at the symposium. Chapters should keep lists of local contacts as well, such as Veteran Services, military hospitals, local Social Security offices...
6. MOAA has publications to help with Personal Affairs:
 - Military Burials (previously called Taps Book).
 - Help Your Survivors now (Public Affairs Workbook with entitlements, financial benefits and a great checklist). Some chapters hold a chapter meeting just to go through the checklist.
 - Turning the Corner. This is good six months after a death.
7. Encourage members to keep their Public Affairs in order, update wills, trusts, living wills, gather documents, and complete the workbook.
8. **DO NOT TAKE ON A POWER OF ATTORNEY.** Only offer advice / counsel.
9. Follow-up with widows. Particularly after the initial flurry of preparations is over and at the one year anniversary of a death.
10. Personal Affairs can be more than helping with deaths. It can be about other life changes and a healthy life at every stage.
11. Review chapter Public Affairs annually.
12. MOAA will send summaries from the Hershey conference.

Also see VCOC website, chapters section, for some photos of VIRGINIA attendees at the Hershey conference.