



Survivor Outreach Services
Serving Survivors of Illinois' Fallen Soldiers
"Never Forgotten.....Never Alone"
January 2011 Bulletin – 9th Issue

Survivor Outreach Services (SOS)

SOS was created to embrace and reassure Survivors that they are continually linked to the Army Family through a unified support program that enables them to remain an important part of the Army for as long as they desire.

The SOS program continuously strives to provide the highest quality of services to surviving Family members of fallen Warriors. As such, we want to provide you with information on the SOS program in your area. We stand ready to serve you and answer your questions.

Services Available:

- Provide Expertise on State & Federal Survivor benefits
- Arrange for estate and financial advice
- Connect Survivors with mental health support/counseling
- Provide assistance in obtaining military reports
- Provide Survivors with resource referrals for:
 - Peer Support
 - Bereavement Counseling
 - Emergency Financial Services
 - Military Legal Assistance
 - TRICARE
 - Educational Benefits
 - Benefits Assistance

Bobby Gillmore, SOS Support Coordinator
Joint Forces Headquarters, 1301 N. MacArthur Blvd, Springfield, IL 62702-2399
(217) 761-3382 office, (217) 316-1191 cell, email: bobby.gillmore@us.army.mil

Jim Frazier, SOS Support Coordinator
NEW LOCATION** -- Woodstock Armory, 1301 Sunset Ridge Road, Woodstock, IL 60098
(708) 646-5933 cell, email: james.l.frazier.ctr@us.army.mil

Robert Sheahan, SOS Support Coordinator
East St. Louis Armory, 2931 State Street, East St. Louis, IL 62205-2233
(618) 558-4196 cell, email: robert.sheahan@us.army.mil

Dollie Carpenter, SOS Support Coordinator
Building 110, East Avenue, Rock Island, IL
(309) 782-8253 office, email: dollie.carpenter@us.army.mil

BROUGHT TO YOU BY THE ARMY FAMILY COVENANT

SURVIVOR SUPPORT PACKAGE



Our Fallen Warriors have paid the ultimate sacrifice and their Families deserve the utmost respect, gratitude and the very best the Family and MWR Command can provide. The Survivor Support Package is designed to embrace and reassure our Survivors that our Nation will always be there for them. The Family and MWR Command is proud to offer discounts at the Armed Forces Recreation Center Resorts honoring Survivors from all services.



Save 50% off room rates



Discount cannot be combined with any other offer. Rate extends to family members and sponsored guests accompanying authorized users. Package rate is based on availability. Can be applied to up to three rooms for a maximum of 14 days. Eligible users are defined as Family Members who have suffered a loss of a sponsor in the event of an Active Duty death, regardless of cause and also may be uniformed personnel. The presence of "DB" (Death Beneficiary) or "Unremarried Widow" in the Sponsorship Status/Relationship field on identification cards or by presentation of the DD1300 will serve to identify members for the purpose of this policy. Must be booked in advance by contacting our Vacation Planning Center with the booking code "Survivor Support Package".

WWW.EDELWEISSLODGEANDRESORT.COM

CALL 08821-9440 MONDAY - FRIDAY 0800 - 1800 HOURS



SURVIVORS' FAMILY PROGRAM 50% OFF ROOM RATES

Delivering the Army's commitment to Survivors.

For family members who have suffered a loss of an Active Duty Sponsor.

The Survivor Family Program is applicable to anyone with an ID indicating
DB or URM (Unremarried Widow).

For details or information, please call 955-0555 or visit www.halekoa.com.



IMCOM



HALE KOA HOTEL



Effective December 18, 2010. Based on availability. Maximum 14 night stay. Up to 3 Guest Rooms.
Survivor Family Member must make and confirm reservation and be listed as primary occupant.
Must present DB or Unremarried Spouse in the Sponsorship Status/Relationship field on I.D. cards or DD1300.



SOS Financial Counseling Services

Mark Dunlop
Ft. Leonard Wood, MO
(573) 596-0153
mark.dunlop1@us.army.mil

Shawn Jacques
Rock Island, IL
(309) 782-3896
shawn.jacques@us.army.mil

Tax Preparation for 2010 Returns

The following information and instructions are provided to ensure that your visit is as efficient as possible when you meet with a tax preparer.

1. Ensure that you bring the following forms before seeing a tax preparer:
 - All W-2's (If you do not have your W-2 yet, contact your employer).
 - IRS Forms 1099's stating interest, dividends, capital gains, distributions from pensions & IRA's.
 - Unemployment compensation and other income information.
 - All information regarding any credit or deduction you wish to claim.
 - Social Security cards/ numbers for you and all dependents you will claim.
 - A copy of last year's return, if itemizing.
 - A Power of Attorney, if required.
 - If claiming the child/dependent care deduction, you must have proof of payment and the caregiver's SSN or Employer's Employee Identification Number (EIN).
 - To claim adjustments, credits or itemized deductions, have receipts & totaled amounts.
 - To claim a dependency exemption, a non-custodial parent should have IRS Form 8332 (Release of Claim to Exemption for Child of Divorced or Separated Parents), Separation Agreement or Divorce Decree.
2. **Social Security Numbers (SSNs) and names must match exactly Social Security cards or processing of your return and any refund will be delayed.**
3. Amended returns cannot be electronically filed.
4. Ensure that you sign and date the return and that your spouse does so also, if filing a joint return. Keep a copy of your tax return for at least three years. Remember that your return must be in the US. mail no later than 15 April 2011 or it is late. If possible, use the label and envelope sent to you from the IRS. Your refund, if any, will arrive within 4-6 weeks. **To check on your refund call the IRS at 1-800-829-1040.**
5. Your tax return is ultimately **your responsibility**. Be sure to review your tax return before signing it.

LINKS TO ALL 50 STATES TAX FORMS: <http://www.50states.com/tax>

IRS WEBPAGE: <http://www.irs.gov>

GENERAL INFORMATION TAX SITES (inclusion of these sites does not constitute an endorsement by the U.S. Government)

<http://govspot.com/tax/> <http://taxes.yahoo.com> <http://1040.com> <http://taxplanet.com>

Those eligible (with military identification cards) to get their taxes prepared through the Tax Assistance Center may receive some tax preparation services at their nearest military installation. Alternatively, for tax preparation services via Military One Source link to HR Block, eligibles can call Military One Source: 1-800-342-9647.

HEROES ACT AND OTHER TAX ISSUES FOR SURVIVORS:

Many professionals are aware of Publication 3 when they assist Survivors, but the less common Pub 559 and Pub 590 are often overlooked since they are not used as much.

Publication 3 Armed Forces' Tax Guide talks about [Forgiveness of Decedent's Tax Liability](#), [Combat Zone Related Forgiveness](#), [Terrorist or Military Action Related Forgiveness](#) and [Claims for Tax Forgiveness](#).

http://www.irs.gov/publications/p3/ar02.html#en_US_publink1000176324

Publication 559 Survivors, Executors, and Administrators includes information on Tax Forgiveness for Armed Forces Members, Victims of Terrorism, and Astronauts.

<http://www.irs.gov/publications/p559/index.html>

<http://www.irs.gov/publications/p559/ar02.html>

Publication 590 Individual Retirement Arrangements (IRAs) describes treatment of Death Gratuity (DG) which can be up to \$100,000. and Service members Group Life Insurance (SGLI) which can be up to \$400,000. According to the IRS these can be treated like rollover Roth IRA monies (here is a one year time limit for the election) as noted in the section on Military Death Gratuities and Service members' Group Life Insurance Payments:

<http://www.irs.gov/publications/p590/ch02.html> and as noted in VI. Section 109 of the HEART Act http://www.irs.gov/irb/2010-06_IRB/ar09.html which clarifies some of the Heart provisions as does <http://www.govtrack.us/congress/bill.xpd?bill=h110-6081>.

For budgeting help or any other personal finance assistance, feel free to contact one of the Financial Counselors' listed.

The below is for informational purposes only, and is not intended to imply endorsement by the Illinois National Guard or Survivor Outreach Services Program of any event, organization, corporation, or product.

UPCOMING EVENTS:

Illinois Families of Fallen Service Members Task Force **Discussion/Support Group for Family Members of Fallen Service Members**

Meet other families

Saturday, January 15, 2011

1:00-2:30 p.m.

A light lunch will be served

Institute for Psychoanalysis
122 South Michigan Avenue
Room 1323
Chicago, IL 60603

RSVP to Polly Everett* 312-922-7474, ext. 309 or Judy Schiffman* 312-922-7474, ext. 310
(*members, Illinois Families of Fallen Service Member Task Force)

Discounted parking available at Adams-Wabash Self Park @ 17 E. Adams

Gold Star Families Support Group of Northern Illinois

When: Saturday, January 22, 2011

11:00 am – 3:00 pm

Where: VFW Post 2868
8844 Ogden Avenue
Brookfield, IL 60513-2149
(708) 485-9670

R S V P:

Jean Harris (708) 485-9233

e-mail: harrisjg@sbcglobal.net

Gold for Gold

“Leap of Faith Seminar”

Homestead, Florida (22-23 February 2011)

A life enrichment seminar for those who have lost a loved one serving in the United States Armed Forces. (The day and a half seminar includes, and is built around a tandem jump with the US Army Golden Knights.)

New Registration Deadline -- Monday, January 10th.

Contact: Operation Support Our Troops at (630) 971-1150 or email info@osotil.org

Helpful Contacts and Resources:

Military OneSource

12 free sessions per issue from a counselor in your area (no cost)
1-800-342-9647 or www.militaryonesource.com

Department of Veterans Affairs

Free counseling for all family members including spouses, children, parents and siblings (no cost) 1-800-827-1000 or <http://www.va.gov>

TRICARE

Health and Dental Insurance
<http://www.tricare.osd.mil>

Tragedy Assistance Program for Survivors (TAPS)

1-800-959-TAPS (8277) or www.taps.org

Social Security Administration

1-800-772-1213 or <http://www.ssa.gov>

Defense Finance & Accounting Office

1-800-321-1080 or www.dfas.mil

National Military Families Association (NMFA)

<http://www.militaryfamily.org>

Gold Star Wives of America

1-888-751-6350 or <http://www.goldstarwives.org/>

American Gold Star Mothers

202-265-0991 or <http://www.goldstarmoms.com/>

Please feel free to email me any information or events that may benefit other Survivors. If you know other Survivors that would like to receive future additions of this bulletin, please have them send me an email with the following information:

Name:
Fallen Heroes Name & Branch:
Relationship:
EMAIL Address: