DEPLOYMENT CHECKLIST

This handy checklist can help you tie up any “loose ends” prior to your deployment. We’ve also provided worksheets on which you can record important information. For a complete checklist, refer to the official deployment packet provided by your base.

LEGAL

☐ Write or update wills.
☐ Establish Power of Attorney.

FINANCIAL

☐ Record credit union or bank information.
  ☐ Provide checking and savings account numbers, along with digital access ID and password (see “Important Account Numbers” worksheet).
  ☐ Record credit card numbers and companies’ phone numbers (see “Important Account Numbers” worksheet).

☐ Speak with your credit union or bank.
  ☐ Notify them that debit/credit cards will be used overseas.
  ☐ Ask to be put on Deployment Alert, which will help us serve you better.
  ☐ Set up Direct Deposit.
  ☐ Set up joint accounts, if necessary.
  ☐ Set up an overdraft protection plan like Navy Federal’s Optional Overdraft Protection Service (OOPS).
  ☐ Set up emergency savings accounts.

☐ Inform creditors of your deployment.
  ☐ Notify credit card companies to expect overseas use of your card.
  ☐ Ask creditors if they offer deployment benefits.
  ☐ Inquire about the Servicemembers Civil Relief Act.

☐ Review current and future investment strategies.
  ☐ Update beneficiaries.
  ☐ Record account number(s) and contact information (see “Important Account Numbers” worksheet).
  ☐ Enroll in the Thrift Savings Plan (tsp.gov) or speak to a Navy Federal Financial Group Advisor (1-877-221-8108).

☐ Sign LES release, allowing your spouse access.

☐ Set up a budget for home and deployment expenses (see “Household Budget” worksheet).
  ☐ List loan due dates, addresses, phone numbers, ID and password (see “Important Account Numbers” worksheet).
  ☐ List utility due dates, addresses, phone numbers, ID and password (see “Important Account Numbers” worksheet).
  ☐ Establish who will manage the budget and how withdrawals and expenses will be recorded.
  ☐ Simplify life by setting up recurring payments on Navy Federal’s free Bill Pay—all you need is your online banking Access Number, ID and password.
HEALTH CARE

☐ Confirm TRICARE status.
  ☐ Ensure that family members are enrolled and the information is updated and accurate.
  ☐ Provide spouse with medical cards.
☐ Locate and record important medical information.
  ☐ List prescriptions, including dosages and frequencies.
  ☐ Gather vaccination and eye prescription records.
  ☐ Sign HIPAA release form.
  ☐ Record names, addresses and phone numbers of doctors, dentists and pharmacies (see "Helpful Resources" worksheet).

LIFE INSURANCE

☐ Evaluate your life insurance needs.
  ☐ Update beneficiaries.
  ☐ Record policy number and contact information (see “Important Account Numbers” worksheet).
  ☐ Need life insurance? Speak to a Navy Federal Financial Group Advisor (1-877-221-8108).*

HOUSE

☐ Review homeowners insurance policies.
  ☐ Record company and agent names along with phone and account numbers (see “Important Account Numbers” worksheet).
  ☐ Make and safely store spare keys for house, storage sheds, safes, etc.
  ☐ Record and safely store computer passwords (see “Important Account Numbers” worksheet).
  ☐ Ensure that smoke detectors are working and install new batteries.
  ☐ Replace filters on heating and air conditioning units.
  ☐ Record contact information of trusted repair services (see “Helpful Resources” worksheet).

*Insurance sold through licensed insurance Representatives of various companies.
DEPLOYMENT CHECKLIST

AUTO

☐ Review auto insurance policies.
  ☐ Record company and agent names along with phone and account numbers (see “Important Account Numbers” worksheet).

☐ Make and safely store spare keys for all vehicles.

☐ Sign up for roadside assistance.

☐ Prepare a roadside emergency kit.

☐ Create a schedule for oil changes and tune-ups.

☐ Record contact information of trusted mechanics and dealers (see “Helpful Resources” worksheet).

☐ Car storage

EMERGENCY PREPAREDNESS

☐ Assemble a 72-hour emergency preparedness kit. Visit redcross.org for a comprehensive list of items to include.

☐ Establish and practice a home exit plan.
  ☐ Compile an emergency contact list.
  ☐ Consider establishing an off-site friend or relative to contact should you and your servicemember be unable to reach each other.

FAMILY

☐ Record and safely store computer passwords (see “Important Account Numbers” worksheet).

☐ Notify your child’s school or daycare provider that a family member is being deployed.

☐ Take plenty of photos before and during the servicemember’s deployment.

☐ Discuss the separation, while sharing feelings and asking questions.

☐ Make connection points.
  ☐ Record bedtime stories or wake-up routines to play to your children.
  ☐ Make photo books for both the servicemember and those at home.
  ☐ Make family videos.
  ☐ Install video conference programs like Skype if possible.
  ☐ Post a map of and learn about the deployment location. Consider cooking traditional meals or learning to say “hello” and “goodbye” in the native tongue.
  ☐ Scan and email handmade cards or other art creations.
  ☐ Involve everyone in the letter-writing or emailing process.
  ☐ Create a CD or playlist that contains meaningful or memorable songs.
HELPFUL RESOURCES

FAMILY:
Name: ____________________________
Phone: ____________________________
Name: ____________________________
Phone: ____________________________
Name: ____________________________
Phone: ____________________________

NEIGHBORS:
Name: ____________________________
Phone: ____________________________
Name: ____________________________
Phone: ____________________________

OTHER:
Name: ____________________________
Phone: ____________________________

Take a few minutes to record a list of go-to people. Then give a copy to your spouse or Power of Attorney, and keep one for yourself. Remember to store this in an accessible location.

LEGAL
Lawyer: ____________________________

FINANCIAL
Credit Union or Bank: ____________________________
Life Insurance Agent: ____________________________
Financial Advisor: ____________________________

HEALTH CARE
Health Insurance Company: ____________________________
Doctor: ____________________________
Pediatrician: ____________________________
Pharmacy: ____________________________
Dentist: ____________________________
Optometrist: ____________________________

HOME
Home Repair: ____________________________
Plumber: ____________________________
Electrician: ____________________________
Heating/Air Conditioning Repair: ____________________________
Home Security: ____________________________
Cable Service: ____________________________
Phone Provider: ____________________________
Landlord: ____________________________

AUTO
Auto Insurance Agent: ____________________________
Auto Dealer: ____________________________
Auto Mechanic: ____________________________
INVESTMENTS AND RETIREMENT

Investments
- Company/Agent:
- Phone Number:
- Account Number:
- User ID:
- Password:
- Due Date:

IRA/Retirement
- Company/Agent:
- Phone Number:
- Account Number:
- User ID:
- Password:
- Due Date:

NOTES

____________________________________________________________________________________________________________________________
_______________________________

Should you have questions about your Navy Federal accounts or the services we offer, visit navyfederal.org or call us at 1-888-842-6328 (if overseas, call collect at 1-703-255-8837).
### PERSONAL COMPUTER
<table>
<thead>
<tr>
<th>User ID:</th>
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</thead>
<tbody>
<tr>
<td>Password:</td>
<td></td>
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</tbody>
</table>

### EMAIL ACCESS
<table>
<thead>
<tr>
<th>User ID:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Password:</td>
<td></td>
</tr>
</tbody>
</table>

### VOICEMAIL ACCESS
| Password:     |   |

### SAFE
| Combination: |   |

### FINANCIAL
**Credit Union or Bank Information**
<table>
<thead>
<tr>
<th>Website/Phone Number:</th>
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<tbody>
<tr>
<td>Online Banking Access Number:</td>
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<tr>
<td>User ID:</td>
<td></td>
</tr>
<tr>
<td>Password:</td>
<td></td>
</tr>
<tr>
<td>Checking Account Number:</td>
<td></td>
</tr>
<tr>
<td>Savings Account Number:</td>
<td></td>
</tr>
<tr>
<td>Credit Card Number:</td>
<td></td>
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</tbody>
</table>

**CREDIT CARD 1**
<table>
<thead>
<tr>
<th>Company:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Number:</td>
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<tr>
<td>Account Number:</td>
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<tr>
<td>User ID:</td>
<td></td>
</tr>
<tr>
<td>Password:</td>
<td></td>
</tr>
<tr>
<td>Due Date:</td>
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</table>

**CREDIT CARD 2**
<table>
<thead>
<tr>
<th>Company:</th>
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</thead>
<tbody>
<tr>
<td>Phone Number:</td>
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<tr>
<td>Account Number:</td>
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</tr>
<tr>
<td>User ID:</td>
<td></td>
</tr>
<tr>
<td>Password:</td>
<td></td>
</tr>
<tr>
<td>Due Date:</td>
<td></td>
</tr>
</tbody>
</table>

Take a few minutes to record important account numbers and passwords. Then give a copy to your spouse or Power of Attorney, and keep one for yourself. Remember to store this in a safe, secure location.
IMPORTANT ACCOUNT NUMBERS

HOME

Mortgage/Rent
Company/Landlord: ________________________________
Phone Number: ________________________________
Account Number: ________________________________
User ID: ________________________________
Password: ________________________________
Due Date: ________________________________

Electric/Gas
Company: ________________________________
Phone Number: ________________________________
Account Number: ________________________________
User ID: ________________________________
Password: ________________________________
Due Date: ________________________________

Water/Trash
Company: ________________________________
Phone Number: ________________________________
Account Number: ________________________________
User ID: ________________________________
Password: ________________________________
Due Date: ________________________________

Phone/Cable/Internet
Company: ________________________________
Phone Number: ________________________________
Account Number: ________________________________
User ID: ________________________________
Password: ________________________________
Due Date: ________________________________
IMPORTANT ACCOUNT NUMBERS

AUTO
Auto Loan
Company: __________________________
Phone Number: ______________________
Account Number: _____________________
User ID: ____________________________
Password: __________________________
Due Date: __________________________

INSURANCE
Auto Insurance
Company/Agent: ______________________
Phone Number: ______________________
Account Number: _____________________
User ID: ____________________________
Password: __________________________
Due Date: __________________________

Homeowners/Renters Insurance
Company/Agent: ______________________
Phone Number: ______________________
Account Number: _____________________
User ID: ____________________________
Password: __________________________
Due Date: __________________________

Life Insurance
Company/Agent: ______________________
Phone Number: ______________________
Account Number: _____________________
User ID: ____________________________
Password: __________________________
Due Date: __________________________

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<table>
<thead>
<tr>
<th>MONTHLY BUDGET WORKSHEET</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INCOME</strong></td>
</tr>
<tr>
<td>Income 1</td>
</tr>
<tr>
<td>Income 2</td>
</tr>
<tr>
<td><strong>TOTAL INCOME</strong></td>
</tr>
<tr>
<td><strong>ACTUAL NET TOTAL</strong></td>
</tr>
<tr>
<td>(total income - total expenses)</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>Transportation</td>
</tr>
<tr>
<td>Emergency Funds</td>
</tr>
<tr>
<td>Savings Account</td>
</tr>
<tr>
<td><strong>SAVINGS</strong></td>
</tr>
<tr>
<td>Other (child care, student loans)</td>
</tr>
<tr>
<td>Subscriptions (gym, streaming services)</td>
</tr>
<tr>
<td>Health Insurance</td>
</tr>
<tr>
<td>Entertainment/Recreation</td>
</tr>
<tr>
<td>Clothing</td>
</tr>
<tr>
<td>Food</td>
</tr>
<tr>
<td><strong>PERSONAL</strong></td>
</tr>
<tr>
<td>Other (toiletries, toiletries)</td>
</tr>
<tr>
<td>Parking/Commuting</td>
</tr>
<tr>
<td>Insurance</td>
</tr>
<tr>
<td>Gas/Maintenance</td>
</tr>
<tr>
<td>Loan Payment</td>
</tr>
<tr>
<td><strong>AUTO</strong></td>
</tr>
<tr>
<td>Other Living Expenses (HOA, lawn care)</td>
</tr>
<tr>
<td>Phone/Cable/Internet</td>
</tr>
<tr>
<td>Water/Taxes</td>
</tr>
<tr>
<td>Electricity</td>
</tr>
<tr>
<td>Other Living Expenses</td>
</tr>
<tr>
<td>Insurance</td>
</tr>
<tr>
<td>Maintenance</td>
</tr>
<tr>
<td><strong>HOME</strong></td>
</tr>
<tr>
<td><strong>FIXED EXPENSES</strong></td>
</tr>
<tr>
<td><strong>TOTAL INCOME</strong></td>
</tr>
<tr>
<td>Income 2</td>
</tr>
<tr>
<td>Income 1</td>
</tr>
<tr>
<td>Income 1</td>
</tr>
<tr>
<td><strong>INCOME</strong></td>
</tr>
<tr>
<td>Notes</td>
</tr>
<tr>
<td>Difference</td>
</tr>
<tr>
<td>Actual Amount</td>
</tr>
<tr>
<td>Budgeted Amount</td>
</tr>
<tr>
<td>Month</td>
</tr>
</tbody>
</table>
TIPS FOR EFFECTIVE BUDGETING

BUDGETING FOR THE HOME

- Each year, set aside 1% to 3% of your home’s purchase price for maintenance and repairs.
- Worried about heating and cooling costs? Ask if your utility provider offers budget billing options that spread seasonal spikes across the year.
- Dirty filters can lead to higher energy costs, so make a habit of replacing the filters in your heating system on a regular basis.

Paying Off Debt

- If you’re able to make extra payments toward loans, prioritize paying off the one with the highest interest rate.
- Want to simplify your student loan payments and possibly save on interest? Navy Federal now refines and consolidates federal and private student loans. Learn more at makingcents.navyfederal.org.

Planning for the Future

- Trying to reach a savings goal? Consider breaking it up into smaller, monthly contributions.
- If college is in your or your child’s future, consider making a monthly contribution to a tax-advantaged 529 plan.
- As a general rule of thumb, you’ll need 70% to 80% of your current annual income for each year of retirement. For tips on planning for retirement, visit makingcents.navyfederal.org.

REGULAR EXPENSES

Food

- Plan ahead! Make a detailed food plan every week and buy only what you can store or use within that time.

Health

- Consider enrolling in a Flexible Spending Account (FSA) if your employer offers this benefit. FSAs allow you to put money aside, pre-tax, to pay for certain out-of-pocket healthcare expenses.

Personal/Family

- Do you have childcare expenses? See if your employer offers Dependent Care Flexible Savings—a pre-tax benefit account used to pay for eligible dependent care services like preschool, summer camp, and child or adult daycare.

Transportation

- Consider using public transportation, if available. If you have to use a car, consider ride sharing, especially for your daily commute. Some employers even offer incentives to those who carpool or use public transit.
Need a little help getting organized? Simply cut out these labels and use them with your hanging file folders or other organizational system.

<table>
<thead>
<tr>
<th>AUTO</th>
<th>HEALTH CARE</th>
<th>INVESTMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Care Records</td>
<td>Eye Care Records</td>
<td>Financial Advisor</td>
</tr>
<tr>
<td>Auto Loan</td>
<td>Medical Records</td>
<td>Retirement Accounts</td>
</tr>
<tr>
<td>Title</td>
<td>Prescription Records</td>
<td>Thrift Savings Plan</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EMERGENCY PREPAREDNESS</th>
<th>HEALTH CARE</th>
<th>INVESTMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency Data Card (copy)</td>
<td>Eye Care Records</td>
<td>Financial Advisor</td>
</tr>
<tr>
<td>Emergency Phone Numbers</td>
<td>Medical Records</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>FAMILY</th>
<th>HEALTH CARE</th>
<th>LEGAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birth Certificates</td>
<td>Eye Care Records</td>
<td>Power of Attorney</td>
</tr>
<tr>
<td>Driver’s License (copy)</td>
<td>Medical Records</td>
<td>Wills</td>
</tr>
<tr>
<td>Marriage Certificate</td>
<td>Prescription Records</td>
<td></td>
</tr>
<tr>
<td>Military Orders</td>
<td>Vaccination Records</td>
<td></td>
</tr>
<tr>
<td>Passports</td>
<td>Dental Records</td>
<td></td>
</tr>
<tr>
<td>Social Security Cards</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Miscellaneous</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>FINANCIAL</th>
<th>HOUSE</th>
<th>INSURANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Numbers</td>
<td>Computer Passwords</td>
<td>Auto Insurance</td>
</tr>
<tr>
<td>Credit Union or Bank Passwords</td>
<td>Helpful Resources</td>
<td>Health Insurance</td>
</tr>
<tr>
<td>Receipts</td>
<td>Home Repair Records</td>
<td>Homeowners/Renters Insurance</td>
</tr>
<tr>
<td>Tax Records</td>
<td>Household Budget</td>
<td>Life Insurance</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NAVY FEDERAL CREDIT UNION</th>
</tr>
</thead>
</table>

Take a few minutes to record important bank account information. Then give a copy to your spouse or Power of Attorney, and keep one for yourself. Remember to store this in a safe, secure location.

For questions or to find a branch or ATM near you, visit our website at navyfederal.org or call 1-888-842-6328. Overseas, call collect at 1-703-255-8837.