

# MILITARY OFFICERS ASSOCIATION OF AMERICA

ALAMO CHAPTER  
P. O. Box 340497 Ft Sam Houston, Texas 78234  
(210) 228-9955

## MINUTES OF VIRTUAL STAFF MEETING

Thursday June 4, 2020

Meeting was called to order via Zoom by President Kitty Meyers at 1000 hrs. A quorum was present and acting throughout the meeting.

**Attendees:** CAPT Cora Bayle-Cox, COL Vaughn Caudill, Col Joe Morgan, Col David Patrick, Col Felix Santiago, Col Lisa Skopal, LtCol Kathie Estrada, LtCol Kitty Meyers, MAJ Jim Cunningham, LTJG Rachel Johnson, Janet Morgan, Trish Meserve.

Invocation by Jim Cunningham, Pledge led by Kitty Meyers.

**Secretary:** Col David Patrick, USAF (Ret) – Minutes from the May 14<sup>th</sup> Zoom virtual meeting were reviewed and approved for filing.

**Treasurer:** Col Vaughn Caudill, USA (Ret) – We are doing OK on donations – within \$2500 of our goal. May need to use the reserves for next year's scholarships. The maturity dates of the CD's may involve ACEF "borrowing" money from operations to cover them. First push for donation solicitation will be in July.

### Alamo Chapter Educational Foundation ACEF (501(C)3)

INFLOWS	January	February	March	April	May	June	July	August	September	Oct	Nov	Dec	YTD	2020 Budget	Variance
Donations	459.00	3,185.00	365.00	255.00	265.00								4,529.00	\$ 7,000.00	(2,471.00)
Donation from General Garza				3,000.00									3,000.00	\$ -	3,000.00
The Big Give													-	\$ 1,500.00	(1,500.00)
Other													-	\$ 450.00	(450.00)
Golf Tournament													-		
In													-		
Out													-		
Sub Total Golf	-	-	-	-	-	-	-	-	-	-	-	-	\$ -	\$ 20,000.00	(20,000.00)
<b>TOTAL INFLOW</b>	459.00	3,185.00	365.00	3,510.00	265.00	-	-	-	-	-	-	-	4,529.00	\$ 28,950.00	(24,421.00)
Note: General Garza's \$3k is not included in this YTD total as already spent in 2020															
OUTFLOWS															
Other															
Big Give Admin Fee	200.00												200.00	\$ 400.00	(200.00)
JROTC Medals													-	\$ 450.00	(450.00)
ROTC Admin													-	\$ 400.00	(400.00)
Golf Administration															
Charity															
Warrior & Family Support Ctr													-	\$ 6,400.00	(6,400.00)
MOAA Heritage													-	\$ 125.00	(125.00)
<b>Total</b>	200.00	-	-	-	-	-	-	-	-	-	-	-	200.00	\$ 7,775.00	(7,575.00)
Scholarships															
Col Torrey					1,000								1,000.00	\$ 1,000.00	-
JROTC				1,000									1,000.00	\$ 1,000.00	-
JROTC													-	\$ 1,000.00	(1,000.00)
Gen Herring (JROTC)													-	\$ 1,000.00	(1,000.00)
Col McCarthy (JROTC)													-	\$ 1,000.00	(1,000.00)
Chapter (Jim & Cheryl Cunningham)				1,000									1,000.00	\$ 1,000.00	-
ROTC Navy UT Austin					1,000								1,000.00	\$ 1,000.00	-
ROTC Army UT Austin													-	\$ 1,000.00	(1,000.00)
ROTC Air Force UT Austin													-	\$ 1,000.00	(1,000.00)
ROTC Air Force Texas State				1,000									1,000.00	\$ 1,000.00	-
ROTC Air Force Texas State													-	\$ 1,000.00	(1,000.00)
ROTC Air Force UTSA (Ed & Ruby Marvin)					1,000								1,000.00	\$ 1,000.00	-
ROTC Army UTSA													-	\$ 1,000.00	(1,000.00)
ROTC Army UTSA													-	\$ 1,000.00	(1,000.00)
ROTC Army UTSA													-	\$ 1,000.00	(1,000.00)
ROTC Air Force UTSA					1,000								1,000.00	\$ 1,000.00	-
ROTC Air Force UTSA					1,000								1,000.00	\$ 1,000.00	-
ROTC Air Force UTSA													-	\$ 1,000.00	(1,000.00)
ROTC Army St Mary's					1,000								1,000.00	\$ 1,000.00	-
ROTC Army St Mary's					1,000								1,000.00	\$ 1,000.00	-
ROTC Army Texas A&M Kingsville				1,000									1,000.00	\$ 1,000.00	-
ROTC Army Texas A&M Corpus Christi													-	\$ 1,000.00	(1,000.00)
ROTC Army Rio Grande Valley													-	\$ 1,000.00	(1,000.00)
<b>Total</b>	-	-	-	4,000.00	7,000.00	-	-	-	-	-	-	-	11,000.00	\$ 23,000.00	(12,000.00)
<b>TOTAL OUTFLOW</b>	200.00	0.00	0.00	4,000.00	7,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11,200.00	\$ 30,775.00	(19,575.00)
Decrease/Increase	259.00	3,185.00	365.00	(490.00)	(6,735.00)	-	-	-	-	-	-	-	(6,671.00)	\$ (1,825.00)	(4,846.00)

## Operations (501(C)4)

### Inflows:

	January	February	March	April	May	June	July	August	September	Oct	Nov	Dec	YTD	2020 Budget	Variance
<b>Membership Dues</b>															
MOAA National		2,975.00			250.00								\$3,225.00	\$ 2,500	\$725.00
Austin Chapter													\$0.00	\$ -	\$0.00
New Surv Sp													\$0.00	\$ -	\$0.00
New Retired	20.00	60.00		20.00									\$100.00	\$ 100	\$0.00
New Active Duty													\$0.00	\$ -	\$0.00
New Former													\$0.00	\$ 100	-\$100.00
Renewal Surv Sp	340.00	120.00	60.00	60.00	60.00								\$640.00	\$ 800	-\$160.00
Renewal Retired	1,780.00	740.00	460.00	300.00	440.00								\$3,720.00	\$ 10,000	-\$6,280.00
Renewal Active Duty		20.00	20.00	20.00	40.00								\$100.00	\$ 100	\$0.00
Renewal Former			20.00		20.00								\$40.00	\$ -	\$40.00
<b>Total</b>	<b>\$ 2,140.00</b>	<b>\$ 3,915.00</b>	<b>\$560.00</b>	<b>\$400.00</b>	<b>\$790.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$7,825.00</b>	<b>\$ 13,600</b>	<b>-\$5,775.00</b>
<b>Non-Dues Revenue</b>															
Golf Tournament													\$0.00	\$ 4,000	-\$4,000.00
Travel Awards					-								\$0.00	\$ -	\$0.00
Merchandise (Coins/Shirts)	51.00	46.00											\$97.00	\$ 1,500	-\$1,403.00
Advertising Lariat		100.00											\$100.00	\$ 12,000	-\$11,900.00
ROTC Medals													\$0.00	\$ -	\$0.00
Corporate Partnership		\$ 300.00	\$ 100.00										\$400.00	\$ 1,000	-\$600.00
Donations to Chapter	1,520.00	180.00	275.00	320.00	426.00								\$2,721.00	\$ 6,000	-\$3,279.00
Donations to ACEF	3,185.00	365.00	3,255.00	265.00	711.00								\$7,781.00	\$ 7,000	\$781.00
Social Events	2,623.00	904.00	462.00										\$3,989.00	\$ 15,000	-\$11,011.00
	<b>\$ 7,379.00</b>	<b>\$ 1,895.00</b>	<b>\$ 4,092.00</b>	<b>\$ 585.00</b>	<b>\$ 1,137.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$15,088.00</b>	<b>\$ 46,500</b>	<b>-\$31,412.00</b>
<b>TOTAL INCOME</b>	<b>\$9,519.00</b>	<b>\$5,810.00</b>	<b>\$4,652.00</b>	<b>\$985.00</b>	<b>\$1,927.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$22,913.00</b>	<b>\$ 60,100</b>	<b>-\$37,187.00</b>

Non-Dues revenue, i.e. advertising is not looking great but ARC, BST and RBFCU are still expected to renew.

### Outflows:

Category	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD	2020 Budget	Variance
Copier Mntn Agreement				628.00									628.00	\$ 575	\$(53.00)
Square Service Fee	66.58	32.40			5.33								104.31	\$ 550	\$445.69
PayPal Service Fee	66.73	37.70		10.54	36.91								151.88	\$ 800	\$648.12
D&O Insurance													-	\$ 655	\$655.00
Dues & Subscription	638.00	428.40											1,066.40	\$ 1,700	\$633.60
GT Contractor Incentive													-	\$ 1,500	\$1,500.00
Independent Contr	854.16	1,708.32	1,708.32	1,708.32	1,708.32								7,687.44	\$ 20,500	\$12,812.56
Liability Insurance		487.00											487.00	\$ 500	\$13.00
Marketing													-	\$ 750	\$750.00
Merchandise (Coins/Shirts)													-	\$ 1,500	\$1,500.00
Office	513.98	12.31		600.71	106.24								1,233.24	\$ 3,500	\$2,266.76
Postage & Delivery	86.80	276.80											363.60	\$ 1,500	\$1,136.40
Social Events	2,090.62	1,176.00	636.60										3,903.22	\$ 15,000	\$11,096.78
Special Activities													-	\$ 600	\$600.00
Telephone	129.92	141.42	153.03	152.86	152.84								730.07	\$ 1,800	\$1,069.93
Trans To ACEF	459.00	3,185.00	365.00	3,255.00	265.00								7,529.00	\$ 7,000	\$(529.00)
Volunteer Recognition													-	\$ 100	\$100.00
<b>Total Outflow</b>	<b>\$ 4,905.79</b>	<b>\$ 7,485.35</b>	<b>\$ 2,862.95</b>	<b>\$ 6,355.43</b>	<b>\$ 2,274.64</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>23,884.16</b>	<b>\$ 58,530</b>	<b>\$34,645.84</b>
<b>Surplus(Deficit)</b>	<b>4,613.21</b>	<b>(1,675.35)</b>	<b>1,789.05</b>	<b>(5,370.43)</b>	<b>(347.64)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(971.16)</b>	<b>1,570.00</b>	<b>(2,541.16)</b>

### Cash Balances:

Educational Foundation	Jan	Feb	March	April	May	9-Jun-01	July	Aug	Sep	Oct	Nov	Dec	
<b>RBFCU</b>													
Savings	\$ 5.00	\$ 5.00	\$ 5.00	\$ 5.00	\$ 5.00								
Money Market	\$20,493.56	\$23,687.44	\$24,062.60	\$ 1,822.40	\$ 2,089.09								
Checking	\$ 30.64	\$ 30.64	\$ 30.64	\$19,031.14	\$12,031.80								
Certificates	\$10,085.17	\$10,096.70	\$10,110.02	\$10,122.92	\$10,136.28								
<b>Total</b>	<b>\$30,614.37</b>	<b>\$33,819.78</b>	<b>\$34,208.26</b>	<b>\$30,981.46</b>	<b>\$24,262.17</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>Chapter Operations</b>													
Broadway	\$12,536.37	\$11,201.02	\$13,269.19	\$ 7,898.76	\$ 7,571.12								
RBFCU CD's	\$16,724.73	\$16,743.99	\$16,764.61	\$16,784.58	\$16,804.83								
<b>Total</b>	<b>\$29,261.10</b>	<b>\$27,945.01</b>	<b>\$30,033.80</b>	<b>\$24,683.34</b>	<b>\$24,375.95</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>Social Events</b>													
<b>Chapter</b>													
Inflows	\$ 1,104.00	\$ 766.00	\$ 872.00	\$ 22.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,764.00
Outflows	\$ 1,106.62	\$ 636.60	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,743.22
<b>Variance</b>	<b>\$ (2.62)</b>	<b>\$ 129.40</b>	<b>\$ 872.00</b>	<b>\$ 22.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,020.78</b>
<b>Satellites</b>													
<b>Inflows</b>													
ARC	\$ 23.00	\$ 46.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$69.00
BST	\$ 936.00	\$ 264.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$1,200.00
Austin	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$0.00
<b>Total</b>	<b>\$ 959.00</b>	<b>\$ 310.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,269.00</b>
<b>Outflows</b>													
ARC	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
BST	\$ -	\$ 1,176.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,176.00
Austin	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total</b>	<b>\$ -</b>	<b>\$ 1,176.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,176.00</b>
<b>Variance</b>													
ARC	\$ 23.00	\$ 46.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 69.00
BST	\$ 936.00	\$ (912.00)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 24.00
Austin	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total</b>	<b>\$ 959.00</b>	<b>\$ (866.00)</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 93.00</b>

## Golf:

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	2020 YTD	2020 Budget	Variance	2019
<b>Income:</b>																
Sponsorship													-	18,000.00	18,000.00	17,658.00
Donation													-	2,000.00	2,000.00	1,805.00
Entry Donation Warrior @\$150		150.00											150.00	3,000.00	2,850.00	2,800.00
Entry Fee Player (92 paid, 70% at \$140)		140.00	420.00										560.00	13,160.00	12,600.00	12,328.00
Super Tickets @ \$150		50.00											50.00	5,750.00	5,700.00	4,160.00
<b>Total</b>	\$ -	\$ 340.00	\$ 420.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 760.00	\$ 41,910.00	\$ 41,150.00	\$ 38,751.00
<b>Expenses:</b>																
Ron Ins 11201.02	1,000.00												1,000.00	1,000.00	-	1,000.00
Green Fees 120 @ \$55													-	6,600.00	6,600.00	4,720.00
Awards Dinner 125 @ \$25													-	3,125.00	3,125.00	3,125.00
Lunch													-	1,500.00	1,500.00	-
Lessons													-	210.00	210.00	210.00
Catering Staff Tip													-	220.00	220.00	200.00
Banner													-	140.00	140.00	139.00
Cling for Beverage Carts													-	10.00	10.00	8.00
Hole Signage etc (16 @ \$20)													-	320.00	320.00	320.00
Acrylic Awards 7" @ \$35													-	245.00	245.00	231.00
Acrylic Awards 5" @ \$18													-	90.00	90.00	100.80
Gift Certificates													-	1,560.00	1,560.00	1,560.00
Beverage Tokens 300 @ \$3													-	900.00	900.00	900.00
Gatorades													-	-	-	200.00
Hole in One Ins														400.00	400.00	390.00
Photographer														150.00	150.00	150.00
Goodie Bag Items (shirts, balls & Poker Chip) 150 @ \$30														4,500.00	4,500.00	3,697.50
2nd Logo on Ball													-	120.00	120.00	108.00
Super Tickets													-	-	-	885.00
Shipping													-	500.00	500.00	498.24
<b>Total</b>	\$ 1,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,000.00	\$ 21,590.00	\$ 20,590.00	\$ 18,442.54
													<b>Net Profit:</b>	<b>-\$240.00</b>		<b>\$20,308.46</b>
													-20% MOAA	\$ (48.00)		\$ 4,061.69
													Balance:	\$ (192.00)		\$ 16,246.77
													(2019 \$8,125 each at 50%)			
													50%	Scholarship:	\$ (96.00)	\$ 8,123.38
													50%	WFSC:	\$ (96.00)	\$ 8,123.38

The Golf Planning Committee met on Tuesday and it was unanimously decided to cancel the tournament for this year. Ways to replace the portion that goes to scholarships (last year was \$8k+) will be discussed.

**VP Membership:** COL Felix Santiago, USA (Ret) – Membership numbers are down about 7% from the beginning of the year. This drop is typically counterbalanced by recruitment at newcomer events. Attendance at these events has been limited to essential agencies and Felix is working with JB SA to be included, or at least be able to provide an informational slide during their presentation considering all we do regarding transition etc. Kitty will send Felix the one she uses for the TAP program. Should prepare a 60 second video pitch to be played at such events as virtual meetings will likely be the norm for a while. Kitty nominated Rachel to present the pitch. Rachel advised she has MOAA's talking points and will pull from those. ( Note: These talking points will be sent as a separate attachment to the emailed minutes). David suggested adding the Why MOAA video clip at the end of the pitch.

Current membership stands at 1083 consisting of 237 Active Duty, 163 Surviving Spouses, 24 Former Military and 659 Retired.

**VP Programs:** Col David Patrick, USAF (Ret) – Had to cancel the June events as per the governor attendance at social gatherings could be no more than 20 people. We will play August's event by ear, though it is possible we will not have an event for the rest of the year. Cora suggested hosting something on zoom to keep the connection with the members.

**VP Legislative Affairs:** Maj Jim Cunningham, USA (Ret) – The virtual Storming of the Hill was completed, and all the legislators were contacted. The main message was delaying the proposed reduction of the medical billets.

Not much happening at the state level, all departments are being asked to reduce their budget by at least 5%.

**President:** LtCol Kitty Meyers, USAF (Ret) – Received \$64.94 from MOAA as part of the travel awards agreement. MOAA has set up a COVID-19 relief fund for military members which provides \$500 grant. To find out more visit relief@moaa.org. If anyone knows of someone in need contact the office.

JBSA is beginning to open up the bases. However, there are protocols required to have meetings on post so meeting virtually will continue for us.  
Working with Jack Downey on notifying the supporters of the Golf Tournament – participants, vendors, sponsors etc.

**Scorecard:**

Reviewed each action item and David will update scorecard for a future Board meeting.

**Staff Reports**

**Chaplain:** Chaplain LTC James Taylor, USA (Ret) – Absent. No report.

**VP Public Relations/Marketing:** LtCol Kathie Estrada USAF (Ret) – Posting items to Facebook again. The Big Give has been rescheduled to Sept 10 and will get with Lisa to work this to our best advantage.

**Editor:** (Open) - No report.

**VAC/VGSAA Rep:** MAJ Jim Cunningham, USA (Ret) – No report as meetings cancelled due to COVID-19.

**Administration:** Trish Meserve – 45 renewals for June, 45 from Mar thru May and 15 deleted from February.

**Historian:** (Open) No report.

**Chapter Affairs Officer:** Col Irene Collier, USAF (Ret) – Absent. No report.

**Transition Liaison Officer:** LtCol Kitty Meyers, USAF (Ret) – All meetings are being conducted virtually using Zoom. Red, White & You job fair planning meeting is scheduled for next week, hopefully this November event will still take place. It will be a busy month with CAM week, Red, White & You and Fiesta! Continuing also with individual resume counseling.

**Active Duty Liaison Officer:** Rachel Johnson, LTJG, USCG – Currently researching POCs across all local bases to get more active duty folks involved.

**Scholarship/JROTC:** Col Peter Hunt, USAF (Ret) – Absent. No report.

**Special Activities Representative:** Susie Tolman, Surviving Spouse – Absent. No report.

**Blue Skies of Texas Satellite Chapter Representative:** LtCol Jim Conner, USAF (Ret) – Absent. No report.

**ARC Satellite Chapter Representative:** Col Joe Morgan, USAF (Ret) – Joe & Janet advised still no COVID-19 cases at the ARC! The main dining room is slowly opening and limited to 20 people at a time with reservations. Meetings/events likely won't be allowed until the end of the year. Trish to send Joe ARC membership listing (and BST to Jim).

**Advertising Coordinator:** Col Lisa Skopal, USAF (Ret) – Response from potential advertisers is reluctant, will try to concentrate on Corporate Partnerships. Cora suggested a Go Fund Me page to assist in obtaining scholarship monies – will assist Lisa in setting it up.

**Volunteer Coordinator:** Col Pete Schaub – Absent. No report.

**Solitaires:** (Open) - No report.

**VP Personal Affairs:** Col Stu Myers, USAF (Ret) / CAPT Cora Bayle Cox USN (Ret) – Cora advised Stu will try to join by phone next time. Decedent affairs check list is complete and attached. It can go on the chapter website under resources. Cora to provide an article introducing it to everyone. (See Appendix 1). It could also be made available to the JBSA Retiree Council as well as the Retiree Services Office.

Also, The VA and the Elizabeth Dole Foundation is offering a year's subscription to LinkedIn for veterans and their caregivers

**Other:**

- 1) Warrior Games – Cancelled

**New Business:** None

**MEETING ADJOURNED at 11:01am.**

Next Staff Meeting – Thursday 6 August 10am

Next Board Meeting – TBD

A handwritten signature in black ink, appearing to read "David Patrick". The signature is stylized with a large, sweeping initial "D" and a cursive "Patrick".

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Col David Patrick, USAF (Ret), Secretary

## APPENDIX I



### ESTATE PLANNING (THINGS YOU CAN DO NOW)

The presence of an up-to-date will and related documents allows people to decide on guardians for their children, plan their estate/asset distributions and to appoint someone to take key actions in case they become incapacitated. Mr. Brad Mitchell, attorney with the 502 Force Support Group Legal Office, Joint Base San Antonio recommends the following ([see full article](#)) for estate planning:

- Wills – the centerpiece of an estate plan. The core function of a will is to allow someone to decide how they want their estate/asset distributed upon their death.
- Medical Power of Attorney – Allows someone to make health care decisions for you if you are unable to act for yourself.
- Living Will – (Also known as Advance Medical Directives) – Allows you to make choices for your health care that will be legally binding if you become incapacitated.
- Durable Power of Attorney – Medical power of attorney. Allows someone to make financial decisions and take medical actions for someone. These can include paying bills, filling taxes, renewing car registrations, caring for real estate, among others.

Another aspect to consider for estate planning is your digital footprint. The following are recommendations:

- Document/record your digital estate and include them in your will.
  - Make a list of all the online places where you have stored photos, videos and personal blogs (your stories) or YouTube accounts. Don't forget other social media sites like Facebook, Twitter, Instagram.
  - Record all of your online user names/passwords of sites where you keep photos, videos and social media accounts.
  - Write down instructions for your family of what you would like them to do with all of these physical and digital memories after you are gone. Examples:
    - Facebook (memorialize digital footprint or permanently delete it)
    - Twitter (request to permanently delete)
    - Instagram (memorialize or permanently delete)
  - Assign a digital executor who do you want to execute your final wishes with your photographs? Do your photos need to be scanned and distributed to multiple people? Do you want your online accounts to be disabled or deleted when you die? Just like a traditional estate executor, a digital executor is a trusted individual who will make sure your wishes are carried out.
  - Be sure someone (your digital executor, most likely) knows the access code to unlock your digital devices (phone, tablet, computer) which will hold your most recent photos. Apple intentionally makes it difficult to access a phone when you don't know to unlock the code.

- Keep all of this information in a safe location such as a locked file cabinet or safe (if written), in a password-protected file on your computer or a hard-copy held by your lawyer or trusted family friend.
- Put both names on contracts/registrations. Preferred: John Doe or Jane Doe instead of John Doe and Jane Doe. Examples:
  - Utilities.
  - Credit Cards: Joint and individual accounts.
  - Car Registrations.
  - Safe Deposit Box and other bank accounts.
- National Cemetery Burial: VA website allows you to complete a form in advance to receive certificate for National Cemetery burial.
- List of valuable items, include Serial numbers if appropriate.
- List of Debts (What you owe and to whom)  
Addresses and phone numbers
- File VA Benefit claim, if you have not done so.
- Finally, talk to your spouse or partner about death in hopes of fleshing out your estate plan.



## **DEATH NOTIFICATION/DECEDENT AFFAIRS CHECKLIST (THINGS YOUR LOVED ONES WILL HAVE TO DO WHEN YOU DIE)**

Death notification must be done promptly when a family member or a friend has died. Timely notifications to government agencies and financial organizations including banks and creditors is important in order to reduce the risk of identity theft.

Prompt notification can be made by telephone contacts. Once you receive a copy of the death certificate, this may be required along with a written memorandum to make the official notification complete. Additional documentation maybe needed to include the social security number and appointment form from the probate court if you are the designated executor of the estate. Retain copies for your files.

The funeral home may also notify the companies so check with your designated funeral Director if they have made any death notifications on your behalf.

1. Social Security Administration 1-800-772-1213
2. Veteran's Administration 1-800-827-1000 (If deceased is a former military)
3. Defense Finance and Accounting Service, 1-800-321-1080, (military service retiree receiving benefits)
4. Office of Personnel Management, 888-767-6738.
5. U.S. Citizenship and Immigration Service, if applicable.
6. State Department of Motor Vehicles (If deceased had a driver's license or State ID.

### **FINANCIAL COMPANIES**

- |   |   |
|---|---|
| 1. Credit Card Companies                                | 4. Rental stores  |
| 2. Banks, credit unions and other lending institutions. | 5. Public Library   |
| 3. Mortgage Companies                                   | 6. Alumni Clubs   |
| 4. Financial planners and stockbrokers                  | 7. MOAA, Rotary, Kiwanis, Lions, Veteran's organizations and club |
| 5. Pension providers                                    |   |

### **INSURANCE AND ANNUITIES COMPANIES**

1. Life Insurers and annuity companies
2. Health, Medical, and dental insurers
3. Disability insurer
4. Automotive insurer
5. Mutual Benefit Companies

### **CREDIT REPORTING AGENCIES**

1. Equifax, Experian or TransUnion

### **MEMBERSHIPS**

1. Professional associations and Unions
2. Health Clubs and Athletic Clubs
3. Automobile Clubs



## USEFUL RESOURCES

1. MOAA

Local: <http://www.alamomoaa.org/Home/First.cfm?CFID=2399982&CFTOKEN=54195028>

National:

[https://www.moaa.org/campaigns/joinmoaa/index.aspx?msclkid=e7be42fd5bf81f9442611c4cf6fe&utm\\_source=bing&utm\\_medium=cpc&utm\\_campaign=\(S\)%20-%20Brand&utm\\_term=moaa&utm\\_content=Pure](https://www.moaa.org/campaigns/joinmoaa/index.aspx?msclkid=e7be42fd5bf81f9442611c4cf6fe&utm_source=bing&utm_medium=cpc&utm_campaign=(S)%20-%20Brand&utm_term=moaa&utm_content=Pure)

- MOAA Surviving Spouse Virtual Chapter: MSSVC02@gmail.com

2. VA website: <https://www.va.gov/>,

Ebenefit <https://www.ebenefits.va.gov/ebenefits/homepage>

3. Military website: <https://www.military.com/>

AARP: <https://www.aarp.org/>