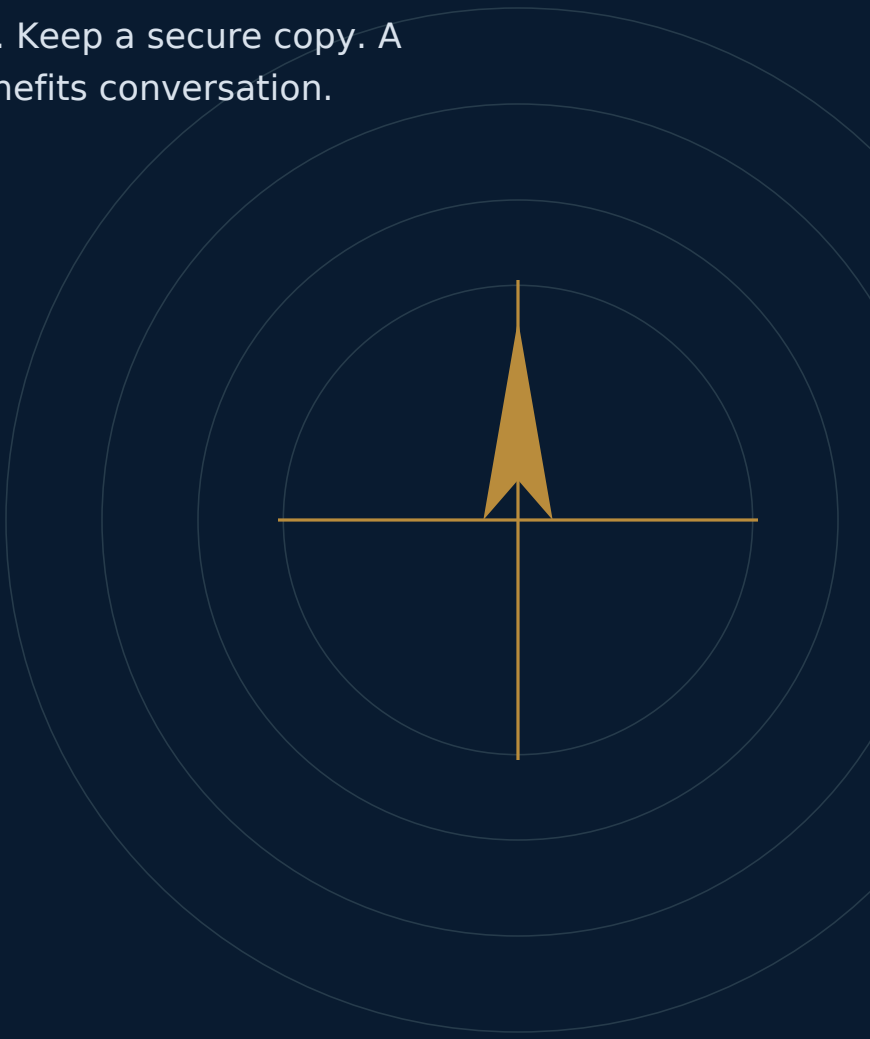
THE ADJUTANT

MILITARY WEALTH · STRATEGY · PURPOSE

ORGANIZE YOUR RECORDS

Military Benefits Document Checklist

Find the record. Confirm the details. Keep a secure copy. A practical organizer for your next benefits conversation.



01 / LOCATE

Know what you already have.

02 / VERIFY

Check dates, names, and missing pages.

03 / ORGANIZE

Turn loose documents into a usable file.

FREE COMPANION RESOURCE / OCTOBER 2026

asktheadjutant.com

01 / INVENTORY

Build your document map

This is a planning inventory, not a universal application attachment list. Mark items not applicable to you; the receiving agency controls what a particular application requires.

Service history

- [ ] Separation documents for each applicable service period (such as DD214).
- [ ] Retirement or separation orders; Reserve/Guard service and points records, if relevant.

Benefits and income

- [ ] Current award/decision letters, benefit statements, and payment records.
- [ ] Pension or Social Security estimates and the date/source of each estimate.

Employment and family

- [ ] Civilian service history and military deposit confirmation, if applicable.
- [ ] Relevant marriage/divorce orders, dependent records, beneficiary elections.

Coverage and decisions

- [ ] Health and life coverage records, enrollment dates, and contact information.
- [ ] Submitted applications, correspondence, deadlines, and confirmation receipts.

Keep complete copies, including attachments and signature pages. Use a separate secure location for identifying numbers and credentials. Do not send personal records to The Adjutant or post them in comments.

02 / FOLLOW THROUGH

Close the gaps

Use one row per document. In the status column, write Have, Requested, Verify, or N/A. Record a folder label, not an account number or password.

Document	Status	Source / next step	Follow-up date

The three records I will locate first:

Before submitting: check the current application instructions, document legibility, full page count, and destination. Retain proof of submission and the version you sent.

03 / KEEP IT USABLE

A secure, simple system

Use the same folder labels for your digital files and paper binder. Review after a major life event or benefits change.

01 Service

Separation documents, orders, service history, and deposit records.

02 Benefits & income

Awards, decisions, estimates, payment statements, and correspondence.

03 Family & coverage

Relevant legal records, elections, beneficiaries, and coverage information.

04 Applications & receipts

Submitted forms, attachments, confirmations, and follow-up notes.

Where to begin

National Archives — request military service records

VA — download benefit letters

VA — records and document services

Official source pages reviewed October 31, 2026. These links help locate records; this checklist does not establish eligibility or replace an agency checklist. Keep originals protected, use secure backups, and test that your saved files open.