

# Survivor Outreach Services Wisconsin National Guard

Volume 3, Issue 1-A Bi-monthly Newsletter

February 2012

## Camp Serenity



Save the date!! Wisconsin National Guard Survivor Outreach Services Program with sponsorship from Wisconsin American Legion will be offering Camp Serenity August 10th-12th, 2012 at Camp American Legion in Lake Tomahawk, WI. This free event will provide an opportunity to come to-

gether with other Survivors from Wisconsin. Your weekend will provide an opportunity to connect with other Survivors, share in family activities and fun in a natural serene setting, and provide resources and information. [Camp American Legion](#)



### Websites:

- [Wisconsin Survivor Support](#)
- [www.snowballexpress.org/](http://www.snowballexpress.org/)
- [www.ourmilitarykids.org](http://www.ourmilitarykids.org)
- [American Legion](#)
- [Gold Star Mothers](#)
- [Gold Star Dads](#)
- [Gold Star Wives](#)

## Army Chief of Staff Letter

Army Gold Star Families,

As we pause to observe the end of Operation Iraqi Freedom/New Dawn, I want to extend my deepest gratitude to those who have borne the enormous burden of sacrifice on behalf of our Nation.

The Secretary of the Army, Sergeant Major of the Army and I have sent the attached letter to the force. I feel compelled, however, to address our Gold Star community personally. No one knows the acute cost of war better than our Gold Star Families and as we close this chapter of our history, our Gold Star Families will always be honored and remembered by a grateful nation.

I know that words will never fully express the sense of loss that you feel, but I assure you that our Army and our Nation will never forget those that bravely gave their last full measure in defense of our freedom.

I humbly thank all of you on behalf of the Soldier, Civilians and Families of the United States Army. To read this letter, or print a copy please [click here](#). *Open letter signed by Sergeant Major of the Army, Raymond F. Chandler III, General, United States Army Chief of Staff, Raymond T. Odierno and Secretary of the Army, John M. McHugh. [Click here](#).*

## Financial Strategies for Recent Survivors

The next Dine and Dial Conference Call will be: April 4, 6:00 p.m. to 7:00 p.m. (Central) - Financial Strategies for Recent Survivors: Call in to talk with Mark and other SOS Financial Counselors and tax preparers about financial and tax opportunities/issues of which Survivors, especially those that are within 1 year of receiving the death gratuity/SGLI, can potentially take advantage of. Contact Mark Dunlop 573-596-0153 if you want to participate and to preregister. This will be a toll call. Each call is deliberately limited to 25 participants; if the scheduled session fills up an additional one will be offered.

## Tax Time-What to Bring?

**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). Alternative if you are missing W2..perhaps your SOS FC can help track it down 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. Amended returns cannot be electronically filed.
2. Ensure that you sign and date the return and that or 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 17 April 2012 or it is late. **To check on your refund call the IRS at 1-800-829-1040.**
3. Your tax return is ultimately **your responsibility**. Be sure to review your tax return before signing it.

### Survivor Outreach Services Coordinators Wisconsin

Kori Williams, MPSC  
262-745-3283  
[kori.williams@us.army.mil](mailto:kori.williams@us.army.mil)

Never Forgotten  
Never Alone

Tara Zarm, MPSC  
715-252-0357  
[tara.zarm@us.army.mil](mailto:tara.zarm@us.army.mil)

## Space Camp

NASA Space Camp is a place of learning where children come together for a journey they will never forget. For many, it is a life-changing event - helping them make decisions about their educational and vocational careers. The Military Child Education Coalition has created a Space Camp scholarship program in memory of one of America's bright young military children, Bernard Curtis Brown II. Bernard was the 11 year-old son of Chief Petty Officer and Mrs. Bernard Curtis Brown, who died tragically Sept. 11, 2001, when the hijacked airliner on which he was a passenger crashed into the Pentagon in Washington, D.C. At the time, Bernard was on his way to California to represent his school at a National Geographic event. Bernard's parents agreed to allow the MCEC to honor Bernard's memory with this scholarship to provide other military-connected children with the opportunity to experience the worlds of science and learning and share their experiences of service to the nation as proud members of Military Families.

There are three Space Camp locations: Huntsville, Ala.; Mountain View, Calif.; and Titusville, Fla. Tuition ranges from \$550 to \$875 and includes meals, lodging and program materials, but not transportation.

The Military Child Education Coalition is now accepting applications for the Bernard Curtis Brown II Memorial Space Camp Scholarship. The scholarship covers full tuition including round trip transportation from the student's home base to Space Camp, meals, lodging and program materials. Applications are available online at [www.militarychild.org](http://www.militarychild.org) For more information about Space Camp, go to [www.spacecamp.com](http://www.spacecamp.com).



## Heart Legislation

In May 2008, the HEART legislation (Heroes Earnings Assistance and Relief Tax Act H.R.6081) was passed. This law enables recipients of military death benefits (death gratuity, Service member's Group Life Insurance, etc.) to contribute any amount up to the total amount of death benefits received into a Roth IRA and/or Coverdell Education Savings Account. These are tax-advantaged accounts which enable the growth of all contributions to be tax free forever! It is NOT an all or nothing proposal – you can contribute any amount you want as long as it is not in excess of the total death benefits.

You are given one year from the date you received the funds in order to take advantage before the window closes. The Survivor Outreach Services program is committed to serving Survivors of deceased military. I can help you deal with the financial complexities you may face (investment & estate planning, credit/debt management, etc.). I educate – I do not sell any financial products nor interfere with any existing financial professional relationships you may have. If I can help you take advantage of the HEART legislation, please contact me by phone at (573)596-0212 or email at

[mark.dunlop1@us.army.mil](mailto:mark.dunlop1@us.army.mil)

—Mark Dunlop, Survivor Outreach Services Financial Coordinator