

From: Merchant, Zeita RDML USCG COMDT (USA) <Zeita.Merchant@uscg.mil>
Sent: Monday, December 1, 2025 9:45 AM
To: Hinds, Robert C CIV USCG COMDT (USA) <Robert.C.Hinds@uscg.mil>; Delisle, Phillip A CAPT USCG COMDT (USA) <Phillip.A.DeLisle@uscg.mil>; Johnson, Will D CAPT USCG COMDT (USA) <Will.D.Johnson@uscg.mil>
Cc: Hulser, Christopher J CAPT USCG COMDT (USA) <Christopher.J.Hulser@uscg.mil>
Subject: Fw: FLAG VOICE: CG Estate Planning and Final Affairs Handbook

FFYSA: Good stuff! VCG forwarded the email to all retired Flags.

Best regards,

Zeita Merchant

Rear Admiral, United States Coast Guard
Assistant Commandant for Workforce Management (CG-WM)

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From: Allan, Thomas VADM USCG COMDT (USA) <thomas.g.allan@uscg.mil>
Sent: Monday, December 1, 2025 8:20 AM
Cc: Merchant, Zeita RDML USCG COMDT (USA) <Zeita.Merchant@uscg.mil>
Subject: FW: FLAG VOICE: CG Estate Planning and Final Affairs Handbook

Good morning,

Hope you all had a Thanksgiving full of family, friends and food. I am very thankful for all of you who are providing us notes and support.

Wanted to share with you all a document that the CG National Retiree Council pushed for and that our HQ team recently completed.

If you have any comments on the products, please direct them to RDML Zeita Merchant (zeita.merchant@uscg.mil and copied on this email) who is spearheading this effort.

Enjoy your December!

v/r-
VADM Tom Allan

Tom Allan
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Coast Guard Estate Planning and Final Affairs Handbook November 28, 2025

As the **Retire Services Program Director and Executive Agent for the Coast Guard National Retiree Council (CGNRC)**, I am committed to supporting the Council's mission to open communication between Coast Guard's Senior Leadership and the CG Retiree Community. Feedback from last year's National Retiree Council made it clear that many of our retirees, annuitants, and surviving family members struggled to navigate the administrative and emotional demands that follow the loss of a loved one. Challenges ranged from arranging funeral services to obtaining military records and securing earned survivor benefits – all during an already difficult period.

To address these issues, the Office of Military Personnel Policy, Compensation, & Travel published the [**CG Military Personnel Estate Planning & Final Affairs Handbook**](#). This resource was also announced in a [**MyCG Article**](#), and printed copies will be mailed to all retirees and annuitants over the next year. I recommend reviewing this guide and encouraging your commands to do the same.

This handbook was championed by our dear friend and colleague, the late **Rear Admiral Michael “Joe” Raymond**, whose vision ensured it would support both the administrative requirements of final affairs and the emotional needs of survivors and caregivers.

This guide is not just for retirees and annuitants. Every Coast Guard family – active duty, reserve, civilian, and auxiliarist will confront these responsibilities at some point. Preparing now strengthens our families' resilience and supports readiness across the Service. Thank you for your continued leadership and advocacy on behalf of our retiree community, our workforce, and their families.



Best regards,

Zeita Merchant

Rear Admiral, United States Coast Guard

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