



PCS Financial Checklist

Instructions

Use this checklist to help organize your PCS move.

MOVING

ITEMS TO CONSIDER	COMPLETED?	NOT APPLICABLE	NOTES
Contact your transportation office and schedule a meeting.			
Meet with military finance center for more information about moving allowances.			
Decide whether you will move yourself, a Do It Yourself Move (DITY), or have your move handled through the Transportation Management Office (TMO).			
Contact the housing office at your new location for availability and wait times if you want to move to installation housing.			
Contact a tax professional or your installation's legal office for information about federal income tax-deductible moving expenses.			
Notify your transportation office if you plan to ship a privately owned vehicle (POV).			
Notify your lender if a loan is outstanding on a vehicle you plan to ship overseas.			

Provide your transportation office with an estimated shipping weight of your household goods (Some moving companies will inventory your goods and provide an estimate, or you can find truck-weighing scales at some gas stations or quarries.)			
Inventory possessions and their value using photographs or videos.			

FINANCES

ITEMS TO CONSIDER	COMPLETED?	NOT APPLICABLE	NOTES
Write down all the anticipated expenses associated with the move.			
Determine which expenses will be reimbursed and the amount you'll need for unreimbursed expenses.			
Determine how you will pay for the unreimbursed expenses. Start saving for additional money that you need.			

RENTING OR LEASING AN APARTMENT, CONDOMINIUM OR HOUSE

ITEMS TO CONSIDER	COMPLETED?	NOT APPLICABLE	NOTES
If you need to break your rental agreement, or terminate your lease, or have concerns about security deposits, talk to military legal assistance attorneys in the JAG office about your rights under the Servicemembers Civil Relief Act (SCRA).			
If you decide to rent or lease, check with the on base housing rental office for reputable locations. See as many apartments as you can. Make comparisons.			
Consider buying renters insurance if you will be renting or leasing.			

SELLING OR BUYING A HOME

ITEMS TO CONSIDER	COMPLETED?	NOT APPLICABLE	NOTES
Consider interviewing two different real estate agents before selecting one to sell your home.			
Find a real estate agent in your new location.			
Work with your agent to determine how much you can spend for a new home.			

IMPORTANT DOCUMENTS

ITEMS TO CONSIDER	COMPLETED?	NOT APPLICABLE	NOTES
Organize all your personal records: birth certificates, insurance papers, marriage licenses, warranties, etc.			
Create a PCS expense tracker and receipt folder.			
Make a list of all of your accounts, and their contact information. Provide your new address, phone number, etc.			

INSURANCE POLICIES

ITEMS TO CONSIDER	COMPLETED?	NOT APPLICABLE	NOTES
Purchase insurance to cover household goods in transit or storage as necessary.			

Plan for storage and insurance of any owned firearms, or obtain permits to ship them internationally.			
Talk to your insurance company about car, home, renters, and household goods insurance coverage (especially about coverage while in transit or storage).			
Make sure your life insurance policy information is current, including the beneficiary designations.			

FAMILY

ITEMS TO CONSIDER	COMPLETED?	NOT APPLICABLE	NOTES
Determine appropriate notification date for spouse's employer.			
If an employed spouse is changing employers, think about rolling over employee retirement plan funds into an IRA to simplify record keeping and provide greater control.			
Contact your local employment office to see if your PCS qualifies your spouse to receive unemployment benefits.			
Contact your children's schools and doctor to see what records you should take with you.			