

**RETIREMENT PLAN BENEFICIARY DESIGNATION FORM** pg 1 of 2

**INSTRUCTIONS:**

If you have more than one Plan, you must complete a *separate* form for each Plan.

If you have a Spouse, your designation of a primary beneficiary other than your Spouse is not valid unless you completed Section 3, your Spouse consented by signing Section 4 and a Notary Public has signed and sealed Section 4.

All sections must be completed in full, unless otherwise indicated.

**Section 1. Participant Information** (please type or print clearly)

Participant's Full Name \_\_\_\_\_

Social Security Number or ITIN \_\_\_\_\_

**Section 2. Beneficiary Designation**

This designation revokes any previous beneficiary designation for this Plan. Unless you specify otherwise, if you designate more than one beneficiary in any one class, the beneficiaries in the class will share equally.

**Primary beneficiary(ies):** If more than two (2), attach additional sheets and check here

- 1. Name \_\_\_\_\_ SSN or ITIN \_\_\_\_\_  
 Spouse  Non-Spouse Percentage \_\_\_\_\_%
- 2. Name \_\_\_\_\_ SSN or ITIN \_\_\_\_\_  
 Spouse  Non-Spouse Percentage \_\_\_\_\_%

**Secondary beneficiary(ies):** If more than two (2), attach additional sheets and check here

- 1. Name \_\_\_\_\_ SSN or ITIN \_\_\_\_\_  
 Spouse  Non-Spouse Percentage \_\_\_\_\_%
- 2. Name \_\_\_\_\_ SSN or ITIN \_\_\_\_\_  
 Spouse  Non-Spouse Percentage \_\_\_\_\_%

**Section 3. Participant Election**

You must initial ONE of the following. I certify that:

\_\_\_\_\_ I do not have a Spouse. (If your divorce is final, and you have not married again, whether by ceremonial, proxy, informal, or common-law marriage, you do not have a Spouse. If you are separated, but your divorce is not final, you do have a Spouse.)

\_\_\_\_\_ I designated my Spouse as the primary beneficiary of my entire death benefit under the Plan.

\_\_\_\_\_ I have a Spouse but designated someone other than my Spouse as the primary beneficiary of all or part of my Plan Account. I understand that my beneficiary designation is not valid unless my current Spouse consents to it in a notarized writing on the form required by the Plan Administrator. I understand that my Spouse has the right to limit his or her consent to permit only those specific non-Spouse beneficiary(ies) now named above. [Complete Section 4 - Spouse's Consent.]

\_\_\_\_\_ I have a Spouse and we both elect to not receive a Death Distribution in the form of an automatic Qualified Pre-retirement Survivor Annuity. [Complete Section 4-Spouse's Consent.]

\_\_\_\_\_ My Spouse cannot be located. I will inform the Plan Administrator if the location of my Spouse becomes known.

\_\_\_\_\_ [I understand that the Plan Administrator will make an investigation to try to find my Spouse.]

\_\_\_\_\_ A court determined that my Spouse abandoned me. [Certified copies of all court orders must be attached.]

\_\_\_\_\_ A court determined that my Spouse is legally separated from me. [Certified copies of all court orders must be attached.]

Your beneficiary designation can be approved only if the Plan Administrator is satisfied as to the correctness of your statement. Your beneficiary designation is valid only so long as your statement above is still true, and that each Spouse's consent statement is effective only for the person who signs it. If your situation changes, you must make a new beneficiary designation with a new Spouse's consent statement; if you don't, all of the Plan's Benefit, if any, after your death will be payable to your surviving Spouse.