

Beneficiary Designation Form



Employee Instructions	The Beneficiary Designation Form is to be used to establish or change the named beneficiary for your 403(b), 457(b) and 401(a) Retirement Accounts. Please complete all of the steps outlined below. Upon completion, you may fax this form to (800) 597-8206				
Employee Information	Participant Name	Social Security Number	Current Date		
Beneficiary Designation	Please select and complete one of the options below:				
	<input type="checkbox"/> Option 1 I am NOT MARRIED and designate the following person(s) to receive any death benefits. I understand that if I marry, this designation becomes void one year after my marriage.				
	SSN	Name	Relationship	Address	%
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	<input type="checkbox"/> Option 2 I am MARRIED and designate my spouse named below to receive ALL death benefits from the Plan.				
	Spouse:				
		Name	_____		
		SSN	_____		
		Address	_____		

	If my spouse is not living, pay death benefits to:				
	SSN	Name	Relationship	Address	%
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	<input type="checkbox"/> Option 3 I am MARRIED and designate the following person(s) to receive death benefits from the Plan (spousal consent required -- see below).				
	SSN	Name	Relationship	Address	%
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
Spousal Consent	I consent to this designation which eliminates all or part of the benefits otherwise payable to me from the Plan if my spouse dies.				
	Spouse's Signature (Required for Option 3)	Date	Notary Public or Plan Administrator (Required for Option 3)	Date	
	_____	_____	_____	_____	
Employee Signature	Employee Signature	Date			
	X	_____			