Beneficiary Designation

Please print in blue or black ink.

Instead of using this form, you can designate your beneficiary online if you are unmarried, or if you are married and designate your spouse as your sole primary beneficiary. Visit www.ipers.org/myaccount.

Section 1: Member Information

Social Security number: _____ Date of birth (mm/dd/yyyy): _____ Male ☐ Female ☐

First name: _____ MI: _____ Last name: _____

Mailing address: _____ City: _____

State: _____ Zip: _____ Work phone: _____ Cell phone: _____

E-mail address (home): _____ Married ☐ Single ☐ Divorced ☐ Widowed ☐

Section 2: Beneficiary Designation – Do not erase or change this section. All information is required for each beneficiary.

Any benefits payable by IPERS at my death will be paid EQUALLY to the following primary beneficiary(ies) who survive me.

	Beneficiary Name and Address	Relationship to You	Sex (M/F)	SSN	Date of Birth (mm/dd/yyyy)
PRIMARY					

If ALL the primary beneficiaries die before I die, any benefits payable by IPERS at my death will be paid EQUALLY to the following secondary beneficiary(ies) who survive me.

	Beneficiary Name and Address	Relationship to You	Sex (M/F)	SSN	Date of Birth (mm/dd/yyyy)
SECONDARY					

Section 3: Member's Signature

Signature of member: _____ Date: _____

Signature of witness (Beneficiary may not act as witness.): _____

Section 4: Spouse's Signature

Spouse's signature is required if you are married and you have not named your spouse as your sole primary beneficiary. If your spouse cannot be located, please contact IPERS for further instructions. As the spouse of the above-named IPERS member, I hereby consent to this beneficiary designation

Signature of member's spouse: _____ Date: _____

Signature of witness (Beneficiary may not act as witness.): _____

Beneficiary Designation

Read all instructions carefully. IPERS will reject incomplete forms.

Instead of using this form, you can designate your beneficiary online. Online designations are accepted if you are single, or if you are married and designate your spouse as your sole primary beneficiary. Visit www.ipers.org/myaccount.

Equal shares. If you name two or more people or entities as your primary or secondary beneficiaries, IPERS will pay the same amount to those beneficiaries at your death.

Who is eligible to be a beneficiary. Any person (related to you or not), church, charity, or estate may be designated as a primary or secondary beneficiary. If you designate your estate as a beneficiary, your benefits will be paid according to your testamentary will or according to state laws for intestate distribution. You may *not* designate a commercial entity, such as a funeral home, as your beneficiary.

Naming beneficiaries (primary and secondary). If you need more space to name your beneficiaries, complete and submit extra *Beneficiary Designation* form(s) and clearly mark them as *page 1 of 2*, etc. You, your spouse (if applicable), and a disinterested witness must sign and date each page. You are not required to designate secondary beneficiaries.

Naming an estate as beneficiary. You may name your estate as either primary or secondary beneficiary by writing *My estate* under Beneficiary Name. If you name your estate as a primary beneficiary, you cannot name a secondary beneficiary.

Example: Estate as beneficiary

Beneficiary Name and Address
My estate

Naming a trust or trustee as beneficiary. You may name a living trust or a testamentary trust as a primary or secondary beneficiary. For a **living trust**, you must include: 1) the specific name of the trust, 2) the date the trust was created, 3) the name of the trustee followed by the word *trustee,* and 4) the trustee's address. We recommend you include a successor trustee in your designation of a living trust. At your death, the successor trustee will be contacted about the death benefits payable.

For a **testamentary trust**, you must include: 1) the specific name of the trust followed by the words *created under my last will and testament*, 2) the name of the trustee followed by the word *trustee*, and 3) the trustee's address.

Example: Living trust as beneficiary

Beneficiary Name and Address
The living trust of Jane J. Smith 01/01/2000
Jane J. Smith, trustee, 123 Main St., Anytown, WI 53001
Albert J. Doe, successor trustee, 123 Main St., Anytown, WI 53001

Example: Testamentary trust as beneficiary

Beneficiary Name and Address
John L. Doe Trust, created under my last will and testament,
Sue J. Smith, trustee, 123 Main Street, Anytown, WI 53001

Naming a charity as beneficiary.

Beneficiary Name and Address
Juvenile Diabetes Research Foundation
5444 NW 96th St.
Des Moines, IA 50000

Remember when completing this form

Once your completed *Beneficiary Designation* form is received and approved by IPERS, it remains in effect until you file a new form or until no further benefits are payable.

No beneficiary on file. If you die and have not designated a beneficiary, your estate may become your beneficiary.

Changing your designation. You may change your beneficiary designation at any time before you begin receiving IPERS benefits by completing and filing a new form. New beneficiary forms filed will cancel all previous designations. If, for example, you want to add a new child or delete any existing beneficiary, you must submit a new form that identifies all requested beneficiaries.

Retired reemployed members. This designation will also change your retirement beneficiary, unless you retired under Retirement Benefits Payment Option 4 or 6 (Joint and Survivor Annuity), for which certain exceptions apply.

IPERS QDRO on file. If you have an IPERS QDRO that names beneficiary(ies) for pre- or post-retirement death benefits, the QDRO beneficiary(ies) will receive the ordered share of death benefits, first. Any remainder *may* be payable to additional primary or secondary beneficiaries designated on this form.

Other legal orders. Other court orders or assignments of record may also affect payments to your other named beneficiaries. This includes, for example, a tax levy, child support, etc.