



You can designate a beneficiary(ies) online through OPERS Online Account Access. If you choose not to designate a beneficiary online, use this form to designate beneficiary(ies) for the Money Purchase Plan.

**STOP** Skip to When you see the stop sign graphic you may have made a selection that does not require you to continue filling out any more information in that step. This is here to help you save time and effort. Follow the instructions associated with the graphic when applicable.

Please print legibly keeping input within the form entry box (one character per box) or bullet.

Fill in entry boxes like this: 

A	B	C		1	2	3
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 Fill in bullet selections like this:  Female

**If you need additional help:**

If you have questions about your designation form or personal information changes, visit [www.OPERS.org](http://www.OPERS.org) to access your account online or call 1-800-222-7377 and speak with a Member Services representative.

*Note: If you have previously made a specific designation of beneficiary under this plan, that designation will be in effect until a new designation is filed and approved. In addition, any of the following life events makes the specific designation invalid: marriage, divorce, dissolution of marriage, legal separation, the birth or adoption of a child or refunding your OPERS account.*

## STEP 1: Contributor Information

The information requested in this step is required and must be completed.

## STEP 2: Family Information

The family information requested in this step will be used to determine the qualified beneficiary(ies) in accordance with Ohio law.

**You can only choose one of following ways to designate your beneficiary(ies): Designation by Automatic Succession (Step 3), or Specific Designation (Step 4).**

## STEP 3: Designation by Automatic Succession

If you want your beneficiary to be determined under Automatic Succession, your beneficiary(ies) will be determined in the following order:

1. Spouse
2. Biological/legally adopted children,
3. Dependent parent(s)
4. Parents (sharing equally),
5. Your estate

To make this selection you must provide your signature in Step 3 and no further action is required.

## STEP 4: Specific Designation

If you wish to designate a person, persons, trust, estate or an institution as your beneficiary, you must complete Step 4, which will require your signature and the signature of two adult witnesses in Step 5.

Please consider the following information prior to making your beneficiary designation:

- If you wish to list additional beneficiaries, use a separate piece of paper. Include all of the information requested for each beneficiary. Any additional pages must be signed by you and witnessed by the two adult witnesses listed in Step 5.

- If you apply for a lump sum annuity and become a contributor again, any previous designations become invalid and automatic succession will apply. In this circumstance, you should file a new designation.
- You may designate multiple (joint) beneficiaries to share equally a refund of the one-time lump sum payment.
- Contingent beneficiary(ies) - applies only in the event of death of ALL primary beneficiary(ies).
- If you choose to designate a trust as a beneficiary, please include a copy of the trust agreement.

## **STEP 5: Contributor and Witnesses Acknowledgment for Specific Designation**

If you make a Specific Designation in Step 4, this section must be signed in the presence of two adult witnesses who must also sign the form the same day. The witnesses cannot be named as beneficiaries in Step 4.

