



Designation of Beneficiary of Guaranteed Account by Combined Plan Retiree Instructions

Use this form to designate beneficiary(ies) to receive any remaining balance of either or both guaranteed account(s), the defined benefit and defined contribution portions of the Combined Plan after your death.

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 to access your account online and view the *Benefit Recipient Handbook*, or call 1-800-222-7377 and speak with a Member Services representative.

Note: If you have previously made a specific designation of beneficiary, that designation will be in effect until a new designation is filed and approved.

STEP 1: Personal Information

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

STEP 2: Beneficiary Information for Defined Benefit Portion of Guaranteed Account

Complete Step 2 only if you have purchased service credit in the Combined Plan and are receiving a benefit for the defined benefit portion of your account under the Single Life Plan and want to change your beneficiary(ies) for the remaining balance of your guaranteed account.

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

- At the time of your death, your beneficiary(ies) will receive a lump sum payment(s) of the remaining balance of the defined benefit portion of the guaranteed account.
- If multiple beneficiaries are designated, they will share the lump sum equally.
- If you designate your trust, please provide a copy of the trust document.

If you wish to designate additional beneficiaries to share payments, 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 4.

STEP 3: Beneficiary Information for Defined Contribution Portion of Guaranteed Account

Complete Step 3 if you are receiving a monthly annuity from OPERS for all or some of the defined contribution portion of your account under the Single Life Plan and want to change your beneficiary(ies) for the remaining balance of your guaranteed account. Complete Step 3 if you have a balance in your individual account with the DC plan administrator and want to change your beneficiary(ies) for the remaining balance of your guaranteed account. Any beneficiary designation changes you make to this portion of your guaranteed account will apply to any defined contribution account balance regardless of whether it was annuitized or remains with the DC plan administrator or both.

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

- At the time of your death, your beneficiary(ies) will receive a lump sum payment(s) of the remaining balance of the guaranteed account(s).
- If multiple beneficiaries are designated, they will share the lump sum equally.
- If you designate your trust, please provide a copy of the trust document.

If you wish to designate additional beneficiaries to share payments, 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 4.

Complete BOTH Steps 2 and 3 if you want to make changes to your beneficiary(ies) for both the defined benefit and defined contribution portions of your account.

STEP 4: Retiree and Witnesses Acknowledgment

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 2 or Step 3.

All pages of the form must be returned to OPERS upon completion, regardless if pages were left blank. Failure to do so will delay processing of the beneficiary designation and you will be required to resubmit the entire form.

