



Designation of Beneficiary of Guaranteed Account by Member-Directed Plan Retiree Instructions

Use this form to designate beneficiary(ies) to receive any remaining balance of the guaranteed account after your death if any of the following apply:

- All or a portion of your Member-Directed Plan account has been annuitized under the Single Life Plan
- You have any balance remaining in your individual account in the Member-Directed Plan with the DC plan administrator

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. Beneficiary designation changes on the Form will apply to all Member-Directed Plan account balances, regardless of whether they were annuitized or remain with the DC plan administrator or both.

STEP 1: Personal Information

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

STEP 2: Beneficiary Information

In this Step, designate the beneficiary(ies) to whom the Ohio Public Employees Retirement System will pay after your death, the remaining balance in your guaranteed account as provided by Ohio retirement law.

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.
- 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, 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 3.

STEP 3: 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.

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.

