



# Designation of Beneficiary of Guaranteed Account by Retiree Instructions

This form is to designate the beneficiary(ies) to receive any remaining balance of the guaranteed account of a retiree receiving a benefit under the Single Life Plan.

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 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

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:

- If multiple beneficiaries are designated, they will share the lump sum equally. Any other unpaid benefits left standing to your credit will be paid to the beneficiary(ies) listed.
- 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.
- If you specifically designated a beneficiary(ies) for the lump sum death benefit on a *Designation of Beneficiary for Lump Sum Death Benefit (DBO-3T)*, that designation remains in effect unless you file another DBO-3T form. You may access the form at [www.opers.org](http://www.opers.org) or call 1-800-222-7377 to request the form. In the absence of a specific designation, the beneficiary(ies) named in this Section will also receive the lump sum death benefit.

## 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.**

