



Age and Service Retirement Benefit Pop Down Request Instructions

Use this form if you are currently receiving an age and service retirement benefit under a Single Life Plan and want to change your plan of payment to the Joint Life Plan and designate your spouse as beneficiary after your marriage. If you were married on June 6, 2005 or after, you have one year from your date of marriage to change your plan of payment. If you were married prior to June 6, 2005, you may change your plan of payment at any time. Your plan of payment change is effective upon OPERS' receipt of this properly completed and valid form. However, the change in your benefit amount is effective on the first day of the month following OPERS' receipt of this form. In the event your death occurs prior to OPERS' receipt of your properly completed and valid form, the change to your payment plan will not take effect and benefits, including health care coverage, will cease.

If your retirement benefit was paid out to you under the Single Life Plan due to required minimum distribution and you were married at the time, you have one year after your effective date to provide a continuing benefit to your spouse. Your plan change is effective on the effective date of your benefit paid due to required minimum distribution and you will be responsible for the overpayment.

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 request or personal information changes you can visit www.OPERS.org to access your account online or call 1-800-222-7377 and speak with a member services representative.

STEP 1: Personal Information

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

STEP 2: Payment Plan and Beneficiary Designation

You must provide proof of date of birth for your spouse and a marriage certificate.

Joint Life Plan requires a whole percentage between 10-100%.

If you specifically designated a beneficiary(ies) for the lump sum death benefit on a *Designation of Beneficiary for Lump Sum Death Benefit* (DBO-3), that designation remains in effect unless you file another DBO-3 form. You may access the form at www.opers.org or call OPERS at 1-800-222-7377 to have the form sent to you. In the absence of a specific designation, the beneficiary named on this form will also receive the lump sum death benefit.

STEP 3: Spousal Consent

This step must be completed and signed by your spouse in the presence of a Notary Public.

STEP 4: Retiree Acknowledgment

Your signature is required and must be witnessed by a notary.

