Plan of Payment Change - Marriage Instructions

Single Life Plan Participant

If you are currently receiving your Additional Annuity, Money Purchase, Combined Plan, Member-Directed Plan or Traditional Pension Plan 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, this form will need to be completed. You must provide proof of your spouse's date of birth along with a marriage certificate. 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 can change your plan of payment at any time. Your plan of payment change is effective upon OPERS' receipt of the properly completed and valid *Plan of Payment Change - Marriage* form. However, the change in your benefit amount is effective on the first day of the month after OPERS receives the form. In the event your death occurs prior to OPERS receiving the properly completed and valid form, the change to your payment plan will not take effect and benefits will cease.

If your Traditional Pension Plan, Combined Plan, Member Directed Plan, Additional Annuity or Money Purchase was paid out to you under the Single Life plan due to required minimum distribution and you were still 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 the required minimum distribution and you will be responsible for the overpayment. Receipt of this form after the 15th of the month may result in an overpayment of which you will be responsible.

This form might not be accepted and/or processed if:

- The form was not completed using ink - it must be completed in ink.
- The form has alterations and/or white outs.
- The form is not signed or notarized or was not signed the same day as it was notarized.

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

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 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. You must enter either your Social Security number or OPERS ID. You are not required to enter both.

STEP 2: Benefit Information

Please indicate which benefit types you are receiving in which the plan of payment should be updated. The information requested in this step is required and must be provided. This plan of payment change applies to a benefit paid from the Traditional Pension Plan, the Additional Annuity, the Money Purchase annuity, and the Defined Benefit portion of the Combined Plan. This change also applies to the Member-Directed Plan and the Defined Contribution portion of the Combined Plan if the benefit was in effect prior to Jan. 1, 2027.

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STEP 3: Payment Plan and Beneficiary Designation

You must provide proof of date of birth for your spouse and a marriage certificate. Joint Life Plan requires you to choose a whole percentage between 10 - 100%.

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

STEP 4: Spousal Consent

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

STEP 5: Retiree/Contributor Acknowledgment

Your signature is required and must be witnessed by a Notary Public.