

# Introduction

## Beneficiary Selection Form

### (If Member Dies Before Retirement)

Form Last Revised: October, 2001

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The *Beneficiary Selection Form* allows a member to select an eligible beneficiary to receive an allowance if the member dies before retirement and to select a beneficiary(ies) to receive payment of accumulated deductions and other payments due to a member if the member dies before retirement. Keep in mind:

- Only certain of your relatives qualify as an eligible beneficiary for benefits under G.L. c. 32, § 12(2)(d), but any person or entity can be selected as a beneficiary(ies) for a return of your accumulated total deductions.
- Your selection on this form may be superseded by an eligible spouse under the provisions of G.L. c. 32, § 12(2)(d) if you die before retirement.
- This form becomes void upon your retirement.
- If you divorce or your personal situation changes, you may wish to file a new form with your retirement board.



# Beneficiary Selection Form (If Member Dies Before Retirement)

Form Last Revised: October, 2001

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| <b>Retirement Board:</b> Please place your address and phone number here. ▶ |  |
|---|--|

## Choice of Beneficiary to Receive a Return of Accumulated Total Deductions at Member's Death

I, (Print Name) , a member of the  Retirement System hereby request the Board of Retirement to pay any sum referred to in G.L. c. 32, § 11(2)\* due at my death to the following beneficiary or beneficiaries in the proportions designated.

My selection may be superseded by a selection under G.L. c. 32, § 12(2)(d) if I die leaving an eligible spouse who elects to receive a monthly benefit.

I understand that I may change my beneficiary designation at any time prior to my retirement and that upon my retirement, this form becomes void.

\*The types of payments covered under G.L. c. 32, § 11(2) include:

- The payment of the accumulated deductions credited to a member's account in the annuity savings fund at the date of death when the member's death occurs prior to his/her retirement.
- The amount of any uncashed checks payable to a member at his or her death.
- Any person or entity may be a beneficiary under G.L. c. 32, § 11(2). Give complete name and address of each beneficiary below:

|                              |                      |                       |                      | Date of Birth        |
|------------------------------|----------------------|-----------------------|----------------------|----------------------|
| Name                         | SSN                  | Proportion To Be Paid |                      |                      |
| <input type="text"/>         | <input type="text"/> | <input type="text"/>  | <input type="text"/> | <input type="text"/> |
| Address <input type="text"/> |                      |                       |                      |                      |
| <input type="text"/>         | <input type="text"/> | <input type="text"/>  | <input type="text"/> | <input type="text"/> |
| Address <input type="text"/> |                      |                       |                      |                      |
| <input type="text"/>         | <input type="text"/> | <input type="text"/>  | <input type="text"/> | <input type="text"/> |
| Address <input type="text"/> |                      |                       |                      |                      |
| <input type="text"/>         | <input type="text"/> | <input type="text"/>  | <input type="text"/> | <input type="text"/> |
| Address <input type="text"/> |                      |                       |                      |                      |

Member's Signature \_\_\_\_\_ Date \_\_\_\_\_

Member's Address



|                      |                      |                          |                      |
|----------------------|----------------------|--------------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |
| Member's Last Name   | First                | M.I.                     | Social Security #    |

**To Be Completed by Witness of Choice of Beneficiary of Accumulated Total Deductions.**

Signature of Witness \_\_\_\_\_ Date \_\_\_\_\_

Name of Witness (Print) \_\_\_\_\_

**Choice of Option (D) Beneficiary**

I, (Print Name) , a member of the  Retirement System, hereby nominate the beneficiary \* listed below, under the provisions of G.L. c. 32, § 12(2)(d) to receive from the retirement system a benefit equal to the Option (C) retirement allowance which would otherwise have been payable to me in the event that I die before being retired.

I understand that I may change my beneficiary designation at any time prior to my retirement and that upon my retirement this form becomes void.

I understand that this choice of Option D Beneficiary can be superceded if, at my death, I leave a spouse to whom I have been married for over one year and with whom I am living on the date of my death, or if living apart, for justifiable cause as determined by the Retirement Board.

**Beneficiary**

|  |                                      |
|--|--------------------------------------|
| <input type="text"/>                                       | <input type="text"/>                 |
| Name of Eligible Beneficiary                               | Beneficiary's Relationship to Member |
| <input type="text"/>                                       | <input type="text"/>                 |
| Beneficiary's Date of Birth ( <i>Attach birth record</i> ) | Beneficiary's Social Security #      |

**Member**

Member's Signature \_\_\_\_\_ Date \_\_\_\_\_

|                         |   |
|-------------------------|---|
| <input type="text"/>    | <input type="text"/>                          |
| Member's Street Address | Member's Social Security #                    |
| <input type="text"/>    | <input type="checkbox"/> <input type="text"/> |
| City/Town               | State Zip                                     |

**To Be Completed by Witness of Choice of Option D Beneficiary**

Witness' Signature \_\_\_\_\_ Date \_\_\_\_\_

Witness' Name (Print)

\* An eligible beneficiary is defined under G.L. c. 32, § 12(2)(d) as the spouse, former spouse who has not remarried, child, father, mother, sister or brother of the member.