

Instructions for Tier One or Tier Two Pre-Retirement Beneficiary Designation

General information

- Type or print clearly in dark ink. Illegible forms may be returned, which could delay your request.
- Do not change anything on the form; alterations will void the form.
- Sign and date the statement on page 2 at the bottom of the form, and mail or fax the form to PERS.

Section A: Member information

Fill in this section completely. Make sure you provide your Social Security number (SSN) and your PERS number in the boxes at the top right-hand side of the application. If you do not know your PERS number, leave the PERS number box (located directly above your SSN) blank. Enter your date of birth in the area provided.

Section B: Beneficiary designation

Check the first box, to indicate you want to use the standard beneficiary designation, and sign in Section D.

When you choose the standard designation, you do not name any specific person. Instead, your beneficiary selection follows the order described in law.

The standard designation directs PERS to pay benefits in the order listed below:

- 1) To your spouse if you are legally married at the time of your death. If you are not, then to
- 2) your child* or children in equal shares. If any of your children are deceased, their portion is equally divided between their children who are alive at your death. If all of your children predecease you, their equal shares will be paid to their children. If there is no one in this group, then
- 3) to your mother and father in equal shares. If one of them predecease you, his/her share is paid to the other parent. If both parents predecease you, then
- 4) to your brothers and sisters in equal shares. If any one of them predecease you, their share will be paid to that sibling's children equally. If all of your brothers and sisters predecease you, all of their children will share equally. If there is no one in this group, then
- 5) payment will be made to your estate.

*Natural born and adopted children are considered “children” even if you selected the standard designation before or after their adoption or birth. If your children are adopted by someone else, they are not considered your “children” under the standard designation. If you wish to name the adopted-out children as your beneficiary, use the specific designation part of this form.

Check the second box to indicate you want to use the specific beneficiary designation, complete Section C, and sign in Section D.

Check the third box to indicate you want to name your estate as beneficiary, complete the fields below the box, and sign in Section D.

Check the fourth box to indicate you want to name a trust as beneficiary, complete the fields below the box, and sign in Section D.

Section C: Specific beneficiary designation

If you choose to name specific beneficiaries, you must list each beneficiary, your relationship to the beneficiary, and the percentage of your benefit you want to go to each person or entity you named. See Appendix C, [page 29](#), of the *Tier One/Tier Two and Individual Account Program (IAP) Pre-Retirement Guide* for an example of Specific Retiree Designation of Beneficiary.

If you have more than three beneficiaries, attach an additional sheet of paper that includes all the same information listed in the table for each beneficiary. Include your name and SSN at the top of each additional paper.

If you have a complex beneficiary situation, you may want to consult an estate planning attorney.

Section D: Applicant signature (required)

Print and sign this form. This form is not valid unless you sign and date it. Incomplete forms will be returned. Mail to PERS, PO Box 23700, Tigard, OR 97281-3700, or fax it to 503-598-0561.