

Online Beneficiary Designation

Naming a beneficiary under your employer's retirement plan could help make sure that upon your death, your assets are distributed to the individual(s) of your choice.

Important note before you begin: If you are married, your spouse must be designated as your sole beneficiary to complete your election online. If you choose to designate someone other than your spouse, please visit **Plan Details > Forms** on the participant website to download a paper copy of the form.



If you have difficulty entering the information, or have questions, please contact a Customer Service Associate.

- Step 1** After logging in to your account, select your name in the top right hand corner of your retirement account web page.
- Step 2** Under **Personal Information**, find Beneficiary Information, select your plan account, and click **Add/Edit**.
- Step 3** Confirm your **Marital Status**. Then click **Next**. Enter the requested information. Items marked with an asterisk (*) are required. If married, to enter information online, your spouse must be your sole beneficiary. If married and you want someone other than you spouse as sole beneficiary, you must fill out a paper beneficiary form located in the **Forms** section.
- Step 4** Here you can **Add Beneficiary/Change Information/or Remove** old information.
Note: If adding a new beneficiary you will need their Social Security number, Date of Birth, mailing address, and the percentage you would like them to receive. Once you make your changes click on **Submit**.
- Step 5** When you have entered all desired beneficiary/contingent beneficiary information, be sure to click **Save**.
- Step 6** You are now ready to submit your Beneficiary designation(s). When complete, you will see a confirmation screen with your beneficiary designation(s).



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