



Beneficiary Designation

Active or Vested Member Death Benefits

515-116AVJ-25
04

Use this form to designate a person or entity as your primary and contingent beneficiaries for receipt of retirement funds in the event of your death before retirement. Include all the information requested below, including a Social Security number for an individual or taxpayer identification number (TIN) for an entity. You may change your beneficiaries in the future by completing a new form. Please read and reference the instructions at the end of the form, print clearly in ink, sign the form, and return the original form to URSJJ at the address below.

PART 1 – MEMBER INFORMATION

Name (First, Middle, Last)		Social Security number		Marital status <table><tr><td><input type="checkbox"/></td><td>Married, but separated</td></tr><tr><td><input type="checkbox"/></td><td>Married</td></tr><tr><td><input type="checkbox"/></td><td>Never married</td></tr><tr><td><input type="checkbox"/></td><td>Divorced</td></tr><tr><td><input type="checkbox"/></td><td>Widowed</td></tr></table>	<input type="checkbox"/>	Married, but separated	<input type="checkbox"/>	Married	<input type="checkbox"/>	Never married	<input type="checkbox"/>	Divorced	<input type="checkbox"/>	Widowed
<input type="checkbox"/>	Married, but separated													
<input type="checkbox"/>	Married													
<input type="checkbox"/>	Never married													
<input type="checkbox"/>	Divorced													
<input type="checkbox"/>	Widowed													
Mailing address (Street or P.O. Box)		City	State	Zip code										
Personal email address		Phone number												

PART 2 – PRIMARY BENEFICIARY INFORMATION

	Full legal name of person(s), trust or entity	Address, City, State, Zip+4	Relationship to member	Date of birth	Social Security number or TIN
1.					
2.					
3.					
4.					

PART 3 – CONTINGENT BENEFICIARY DESIGNATION – Receives funds only if all primary beneficiaries are deceased, disclaim or, in the case of an entity, is no longer in existence.

	Full legal name of person(s), trust or entity	Address, City, State, Zip+4	Relationship to member	Date of birth	Social Security number or TIN
1.					
2.					
3.					
4.					

☐ Mark here if you need to designate additional beneficiaries than the space above allows. You can obtain an Additional Beneficiary Designation page at www.opers.ok.gov/forms or by calling (800) 733-9008.

PART 4 – SIGNATURE

This form reflects my beneficiary designation(s) for active or vested member death benefits from Uniform Retirement System for Justices and Judges. I have read the instructions and understand that this form supersedes and revokes all prior designations and is effective only when received by the Uniform Retirement System for Justices and Judges.

Signature

Date



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BENEFICIARY DESIGNATION INSTRUCTIONS & INFORMATION

This form is to be used only by active or vested members of the Uniform Retirement System for Justices and Judges (URSJJ) to designate or change beneficiaries to receive one of the following death benefits:

Spouse Benefits

If you are married and you have at least eight (8) years of service at the time of your death, your spouse is entitled to a lifetime survivor benefit. If your spouse chooses a survivor benefit, no other beneficiary will receive your accumulated contributions. A survivor benefit is payable to your spouse under 1) the Original Surviving Spouse Plan if the required additional contributions were paid prior to September 1, 2005 or 2) the Option B Plan (100% Joint and Survivor Annuity).

Accumulated Employee Contributions

This is a one-time lump-sum payment equal to your accumulated contributions. If no surviving spouse benefit is paid at your death, your accumulated contributions will be distributed among your primary beneficiaries. If one or more of your primary beneficiaries are deceased, disclaim, or are no longer in existence, accumulated contributions will be distributed among your remaining primary beneficiaries. Contingent beneficiaries will receive accumulated contributions only if there are no living primary beneficiaries, the primary beneficiaries disclaim, a named entity no longer exists, or a combination thereof.

Whom Can You Name as Beneficiary?

You may name:

- A living person;
- An entity;
- Your estate;
- A trust; or
- Any combination of these options.

Primary Versus Contingent Beneficiaries

- Primary beneficiaries are "first in line" to receive benefits in the event of your death. All primary beneficiaries share equally, unless otherwise indicated on the form.
- Contingent beneficiaries only receive benefits in the event all primary beneficiaries die, disclaim, or the entity ceases to exist before or simultaneously with the member. All contingent beneficiaries share equally, unless otherwise indicated on the form.

Information to Provide

Provide the full legal name, address, relationship, date of birth and Social Security number of each individual person or taxpayer identification number (TIN) of each institution or entity. Complete information helps ensure the named beneficiary is located and receives distribution. The primary and contingent beneficiaries should be different individuals or entities.

Designating an Entity as Beneficiary

To name an entity (charity, church, etc.), please provide all the information requested in Parts 2 and/or 3.

Designating a Trust as Beneficiary

To designate a trust as beneficiary, provide the name of the trust and the date the trust was created in the space provided for naming a beneficiary. Please provide a copy of the Memorandum of Trust listing the names of the initial and successor trustees when submitting the beneficiary designation form.

Designating a Minor as Beneficiary

A minor may be a beneficiary. URSJJ must follow the Uniform Transfers to Minors Act when making payments to minor beneficiaries. Please contact URSJJ for more information.

Each time you complete a beneficiary form, it cancels all prior beneficiary designations with URSJJ. Your designation is not effective until this form is signed and received by URSJJ. This beneficiary form does not update any life insurance or SoonerSave beneficiaries.

Naming Additional Beneficiaries

To name more beneficiaries than space allows, use an Additional Beneficiary Designation page. Submit this additional page with your completed Beneficiary Designation form to be valid. The additional page is located at www.opers.ok.gov/forms or contact URSJJ to receive one by mail.

For more information, you may reach URSJJ at the contact information below. When you have completed and signed this form, please return the original form to URSJJ at the address below.

UNIFORM RETIREMENT SYSTEM FOR JUSTICES AND JUDGES

P.O. Box 53007 | Oklahoma City, Oklahoma 73152-3007
Tel 405-858-6737 | Toll-free 1-800-733-9008 | www.opers.ok.gov

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