



Enrollment/Beneficiary Designation



Please print in blue or black ink.

Section 1: Member Information

Social security number: _____ Date of birth (mm/dd/yyyy): _____ Male ☐ Female ☐

First name: _____ MI: _____ Last name: _____

Street address: _____ City: _____

State: _____ Zip: _____ Primary phone: _____ Work phone: _____

E-mail address: _____ Cell phone: _____

Marital status: Married ☐ Single ☐ Divorced ☐ Widowed ☐

Section 2: Beneficiary Designation - Do not erase or change this section. All information is required for each beneficiary.

Any benefits payable by IPERS at my death will be paid EQUALLY to the following primary beneficiary(ies) who survive me.

PRIMARY	Beneficiary Name	Relationship	Sex (M/F)	SSN	Date of Birth (mm/dd/yyyy)

If ALL the primary beneficiaries die before I die, any benefits payable by IPERS at my death will be paid EQUALLY to the following secondary beneficiary(ies) who survive me.

SECONDARY	Beneficiary Name	Relationship	Sex (M/F)	SSN	Date of Birth (mm/dd/yyyy)

Section 3: Member's Signature

You and your spouse must sign and date this form **in front of a disinterested witness**.

Signature of member: _____ Date: _____

Signature of witness (Beneficiary may not act as witness.): _____

Section 4: Spouse's Signature

As the spouse of the above-named IPERS member, I hereby consent to this beneficiary designation.

Signature of member's spouse: _____ Date: _____

Signature of witness (Beneficiary may not act as witness.): _____

Enrollment/Beneficiary Designation

Read all instructions carefully. Forms not properly completed will not be accepted by IPERS.

Clarity is required. Be as clear as possible when you complete this form. IPERS staff will review your form and may reject it if it is unclear or confusing.

Equal shares. If you name two or more people as beneficiaries at one level (primary or secondary), IPERS will pay the same amount to those beneficiaries at your death.

Who is eligible to be a beneficiary. Any person (related to you or not), church, charity, or estate may be designated as a primary or secondary beneficiary. If you designate your estate as beneficiary, your benefits will be paid according to your testamentary will or according to state laws for interstate distribution. You may *not* designate a commercial entity, such as a funeral home, as your beneficiary.

Naming beneficiaries (primary and secondary). If you need more space to name your beneficiaries, complete and submit extra *Enrollment/Beneficiary Designation* forms and clearly mark them as *page 1 of 2*, etc. You, your spouse, and a disinterested witness must sign and date each page. You are not required to designate secondary beneficiaries.

Example: Primary beneficiary(ies)

Beneficiary Name	Relationship	Sex (M/F)	SSN	Date of Birth (mm/dd/yyyy)
Sue Smith	Spouse	F	482829381	05/17/1950

Example: Secondary beneficiary(ies)

Beneficiary Name	Relationship	Sex (M/F)	SSN	Date of Birth (mm/dd/yyyy)
Jim Smith	Son	M	482583969	01/31/1970
Jill Smith	Daughter	F	485297659	07/21/1975
Bob Smith	Son	M	486799103	05/15/1977

Naming an estate as beneficiary. You may name your estate as either primary or secondary beneficiary by writing *My estate* under Beneficiary Name. If you name your estate as a primary beneficiary, you cannot name a secondary beneficiary.

Example: Estate as beneficiary

Beneficiary Name	Relationship	Sex (M/F)	SSN	Date of Birth (mm/dd/yyyy)
My estate				

Naming a trust or trustee as beneficiary. You may name a living trust or a testamentary trust as a primary or secondary beneficiary. For a **living trust**, you must include the following: 1) the specific name of the trust, 2) the date the trust was created, 3) the name of the trustee followed by the word *trustee*, and 4) the trustee's address. We recommend you include a successor trustee in your designation of a living trust. At your death, the successor trustee will be contacted about the death benefits payable. For a **testamentary trust**, you must include the following: 1) the specific name of the trust followed by the

words *created under my last will and testament*, 2) the name of the trustee followed by the word *trustee*, and 3) the trustee's address.

Example: Living trust as beneficiary

Beneficiary Name	Relationship	Sex (M/F)	SSN	Date of Birth (mm/dd/yyyy)
The living trust of Jane J. Smith				
Jane J. Smith, trustee, 123 Main St., Anytown, WI 53001				
Albert J. Doe, successor trustee, 123 Main St., Anytown, WI 53001				

Example: Testamentary trust as beneficiary

Beneficiary Name	Relationship	Sex (M/F)	SSN	Date of Birth (mm/dd/yyyy)
John L. Doe Trust, created under my last will and testament. Sue J. Smith, trustee, 123 Main St., Anytown, WI 53001				

Naming a charity as beneficiary.

Example: Charity

Beneficiary Name	Relationship	Sex (M/F)	SSN	Date of Birth (mm/dd/yyyy)
Juvenile Diabetes Research Foundation				
5444 NW 96th St.				
Des Moines, IA 50000				

Naming a beneficiary with an IPERS QDRO.

Example: QDRO

Beneficiary Name	Relationship	Sex (M/F)	SSN	Date of Birth (mm/dd/yyyy)
Sue Smith, as alternate payee, or her successor alternate payees, if applicable, in the amount specified in Qualified Domestic Relations Order file stamped (date); remainder to Jim Smith, Jill Smith, and Bob Smith, children, equally or to the survivor.				

Remember when completing this form

Once your completed *Enrollment/Beneficiary Designation* form is received and approved by IPERS, it remains in effect until you file a new form or until there are no further benefits payable.

No beneficiary on file. If you die and have not designated a beneficiary, your estate may become your beneficiary.

Changing your designation. You may change your beneficiary designation at any time before you begin receiving IPERS benefits by completing and filing a new form. New beneficiary forms filed will cancel all previous designations. Therefore, if you want to *add* or *delete* a beneficiary, for example a new child, you must include on the new form all beneficiaries you wish to designate.

Retired reemployed members. This designation will also change your retirement beneficiary, unless you retired under Option 4 or 6 (Joint and Survivor Annuity), for which certain exceptions apply.

If you have questions, call our toll-free number, 1-800-622-3849, 7:30 a.m.-5 p.m., Monday-Friday, to speak with an IPERS representative.