



Beneficiary Designation

Defined Benefit Members
(PERS I/II/III, TRS I/II, JRS, EPORS)

FOR OFFICE USE ONLY

Toll-Free: (800) 821-2251
alaska.gov/drb

Division of Retirement and Benefits
P.O. Box 110203
Juneau, AK 99811-0203

Juneau: (907) 465-4460
TDD: (907) 465-2805
Fax: (907) 465-3086

This form allows you to designate a person or institution as your primary and secondary beneficiaries for receipt of retirement funds. Please print clearly in ink and return the original form to the Alaska Division of Retirement and Benefits at the address above.

SECTION I. MEMBER INFORMATION

Please indicate your retirement system:			
<input type="checkbox"/> Public Employees' Retirement System (PERS)	<input type="checkbox"/> Teachers' Retirement System (TRS)		
<input type="checkbox"/> Judicial Retirement System (JRS)	<input type="checkbox"/> Elected Public Officers' Retirement System (EPORS)		
NAME (FIRST / MI / LAST)		SOCIAL SECURITY NUMBER	
MAILING ADDRESS	CITY	STATE	ZIP + 4
MARITAL STATUS <input type="checkbox"/> Married <input type="checkbox"/> Never married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed		EMAIL ADDRESS	

SECTION II. PRIMARY BENEFICIARY DESIGNATION

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

SECTION III. SECONDARY BENEFICIARY DESIGNATION (Will only receive benefits if all primary beneficiaries are deceased.)

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

SECTION IV. SIGNATURE

<p>On this form, I have made my beneficiary designations for active, deferred, or retired member death benefits from the PERS, TRS, EPORS, or JRS. I have read the instructions and understand that this form supersedes and revokes all prior designations and will become effective only when it is received by the Alaska Division of Retirement and Benefits.</p> <p><i>(If you have additional beneficiaries, please attach a second page.)</i></p>	
SIGNATURE	DATE

Beneficiary Designation Instructions and Information

Whom Can You Name as Beneficiary?

You can choose:

- A living person.
- An institution.
- Your estate.
- A trust.
- Any combination of these options.

Primary Versus Secondary Beneficiaries

- Primary beneficiaries are “first in line” to receive benefits in the event of your death. All primary beneficiaries share equally, unless otherwise noted on the form.
- Secondary beneficiaries only receive benefits in the event all primary beneficiaries die before or simultaneously with the member. All secondary beneficiaries share equally, unless otherwise noted on the form.

Information to Provide

Each time you complete a new form, it is important you 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) you designate. You must also designate whether the beneficiary is primary or secondary. Each piece of information helps ensure the named beneficiary is located and the proper person or institution receives the correct distribution.

Designating an Institution as Beneficiary

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

Designating a Trust as Beneficiary

To designate a trust as beneficiary, you should provide the name of the trust and the date the trust was created in the space provided for naming a beneficiary. Please also provide a copy of the Memorandum of Trust with your beneficiary designation.

Designating a Minor as Beneficiary

A minor can be named as your beneficiary. When no custodian has been named, and the amount the amount the minor will receive is more than \$5,000, payment is guided by the Alaska Uniform Transfers to Minors Act. The Alaska Uniform Transfers to Minors Act AS 13.46.010-999 permits transfers of property and money to a person nominated as a custodian for a minor. The custodian must obtain a conservatorship prior to payment of the funds. This is true even if the custodian is the parent or legal guardian of the minor.

Naming Additional Beneficiaries

If you need to name more beneficiaries than space allows on this form, use an *Additional Beneficiary Designation* page. This page must be received with your completed Beneficiary Designation form to be valid. You can download an additional page at Alaska.gov/drb or contact the Division to receive one by mail.

IMPORTANT NOTICE

If you are married, **your spouse is automatically your 100% primary beneficiary unless they consent to another beneficiary.** Your spouse’s written consent may be waived if:

- You were not married to your spouse during any part of your PERS or TRS employment;
- You have been married for less than 2 years and you have established that you and your spouse are not living together; or
- Your spouse cannot be located.

Your spouse may waive entitlement to benefits by completing and signing the *Spousal Waiver of Death Benefits* form (gen054) located on the Division of Retirement and Benefits website at Alaska.gov/drb.

Each time you complete a beneficiary form, it cancels all prior beneficiary designations with the Division for these death benefits. Your designations do not become effective until this form is signed and received in the Division office. This beneficiary form will not update any life insurance beneficiaries you may have.

For more information, please contact the Member Services Contact Center toll-free at (800) 821-2251, in Juneau at (907) 465-4460 from 8:30 a.m. to 4 p.m. Monday-Thursday and 8:30 a.m. to 3 p.m. Friday Alaska Time. You may also contact customer service representatives by email at doa.drb.msc@alaska.gov.

When you have completed and signed this form, please return the original form to the Division at:

Alaska Division of Retirement and Benefits
P.O. Box 110203
Juneau, Alaska 99811-0203

If you are completing this form because you recently divorced, please send a complete court-certified copy of your divorce or dissolution documents to the Division.