

Instructions

Please type or print clearly with a ball-point pen. All sections must be completed for processing. **You must sign and date for the beneficiary designation or change to be valid.** This beneficiary designation cancels all prior designations. Upon completion, please send this form to your Benefits Department.

Please check one: Beneficiary Designation Beneficiary Change

Employee and Plan Information

Member Name (Last, First, M.I.)		Social Security Number	
Address	City	State	Zip
Group Name Fresno Unified School District		Group Number 600762	

Beneficiary Designation

Complete for Employer-paid Basic Life and AD&D Insurance only.

PRIMARY

Full Name	% of Benefit	Address (street, city, state, zip)	Social Security #	Relationship	Date of Birth
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

CONTINGENT – Benefits are only payable to a contingent Beneficiary if you are not survived by one or more primary Beneficiary(ies).

Full Name	% of Benefit	Address (street, city, state, zip)	Social Security #	Relationship	Date of Birth
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

X _____ Date
Signature of Employee

Beneficiary Examples

Two Primary Beneficiaries:					
Peter Smith	60%	77 America St, Anytown, USA 77777	000-00-7777	Husband	
Anna Smith	40%	777 USA St, Anytown, USA 77777	000-00-7899	Daughter	
One Primary & One Contingent Beneficiaries:					
Primary:					
Peter Smith	100%	77 America St, Anytown, USA 77777	000-00-7777	Husband	
Contingent:					
Quincy Smith	100%	789 Tree St, Anytown, USA 77777	000-00-7900	Son	

Beneficiary Information

- Benefits are only payable to a contingent Beneficiary if you are not survived by one or more primary Beneficiary(ies).
- Dependents Insurance, if any, is payable to you, if living, or as provided under your Employer’s coverage under the Group Policy.
- If a minor (a person not of legal age), or your estate, is the Beneficiary, it may be necessary to have a guardian or a legal representative appointed by the court before any death benefit can be paid.
- If the Beneficiary is a trust or trustee, the written trust must be identified in the Beneficiary designation. For example, “Dorothy Q. Smith, Trustee under the trust agreement dated _____.”
- A power of attorney must grant specific authority, by the terms of the document or applicable law, to make or change a Beneficiary designation. If you have questions, consult your legal advisor.