

## **Teachers' Retirement System of Oklahoma**

P.O. Box 53524

Oklahoma City, OK 73152-3524 TRS Member Services: 877-738-6365 (toll-free)

or 405-521-2387 (OKC)

## INSTRUCTIONS FOR COMPLETING BENEFICIARY DESIGNATION FORM 2R

This beneficiary form applies to retired members of the Teachers' Retirement System of Oklahoma (TRS). If you are not retired and wish to update or make changes to your beneficiary designation, please use Beneficiary Designation Form 2A. The beneficiary designations you make on this form revoke and replace all prior beneficiary designations with TRS. Your designations do not become effective until this form is **signed by you** and **received** by TRS. Do not alter this form. **Remember to keep a copy of your completed form for your records.** 

It is very important that you provide the **full legal name**, **address**, **relationship**, **date of birth**, **and Social Security number of each beneficiary you designate**. This information is essential in ensuring that your named beneficiaries can be located and receive your intended benefit amount. The Beneficiary Designation Form has two Sections: Member Account and Death Benefit.

Section 1. Member Account for Max, Option 1, and Option 4 Retirement Only - <u>DO NOT</u> complete this Section if you are selecting Option 2 or Option 3 Retirement. Upon the death of a retired member, the designated beneficiary(ies) shall receive the member's account balance, if any, as provided by law.

**Section 2. Death Benefit** - Upon death of a retired member, TRS shall pay to a designated beneficiary(ies) the sum of \$5,000 as a death benefit. This beneficiary may be the same person(s) named in Section 1, or the member may designate some other person(s) to receive this benefit.

Each Section has three parts: Member Information, Primary and Contingent Beneficiary Designation, and Signature. **Please** print clearly in ink.

**Member Information** – Provide your full legal name and SSN or Member ID.

**Primary Beneficiary Designation** – You can designate one or more primary beneficiaries. All primary beneficiaries share equally unless you note otherwise. If multiple primary beneficiaries are named and a primary beneficiary dies before or simultaneously with you, the remaining primary beneficiary(ies) will be entitled to equal shares of the deceased beneficiary's designated benefit amount.

Contingent Beneficiary Designation – You can designate one or more contingent beneficiaries. Contingent beneficiaries receive benefits only in the event all primary beneficiaries die before or simultaneously with you. All contingent beneficiaries share equally unless you note otherwise on your form. If multiple contingent beneficiaries are named and a contingent beneficiary dies before or simultaneously with you, the remaining contingent beneficiary(ies) will be entitled to equal shares of the deceased beneficiary's designated benefit amount.

Signature—You must sign and date each page of the form.

Mail completed Beneficiary Designation Forms to: Teachers' Retirement System of Oklahoma P.O. Box 53524 Oklahoma City, OK 73152

## BENEFICIARY DESIGNATION (RETIRED)-MEMBER ACCOUNT

Member Name			Member SSN or TRS Member II	)	
SECTION 1 – MEM THIS SECTION IF	IBER ACCOUNT	FOR MAX, C	OPTION 1, AND OPTION 4 RETIRE ION 2 OR OPTION 3 RETIREMEN	EMENT ONLY. DO NOT	COMPLETE retired member.
the designated benefit	ciary(ies) shall red	eive the memb	er's account balance, if any, as provide	d by law.	
A DDIMADVI	DENIEEICIADV (	D DENIERICIA	DIES. It is your important to alcorly ind	licata vaur primary banafi	niamy(ing) IInon
			RIES: It is very important to clearly ind r interest shall pass to the surviving prin		
			is noted, any proceeds payable to suc		
	our primary benef	iciaries, use a c	opy of this page to list additional benef	iciaries.	
I hereby designate:					
Name	Date of Birth	SSN	Address	Relationship	Share (must equal 100%)
beneficiaries, use a co I hereby designate: Name	opy of this page to		beneficiaries will be divided equally. beneficiaries.  Address	Relationship	Share (must
	Birth				equal 100%)
expressly reserve the r	right to make other	and further cha	ing these elections, I hereby revoke all on nges at any time I may elect as provided l be paid as provided by Oklahoma law.	other former designations in the state of th	nade by me and ated beneficiary
Member's Signature			 Date		
	ure must appear ex	xactly as the na	me appears on the top of this form.		
Minor Beneficiary: that a guardian be app			child (younger than 18 years of age) is cent is made.	designated as beneficiary,	it will be necessary

Page 1 of 2

by Oklahoma law, and shall not be liable for the validity of the beneficiary designation.

TRS shall not be responsible for determining the competency of any member to designate/change beneficiaries, except as otherwise provided

## BENEFICIARY DESIGNATION (RETIRED)-DEATH BENEFIT

**SECTION 2 – DEATH BENEFIT:** Upon death of a retired member, TRS shall pay to a designated beneficiary(ies) the sum of \$5,000 as a death benefit. This beneficiary may be the same person(s) named in Section 1, or the member may designate some other person(s)

Member SSN or TRS Member ID

hereby designate: Name	Date of	SSN	Address	Relationship	Share (mus
	Birth		7.00.000	T.O.O.O.O.O.	equal 100%
ribution is noted,	neficiary(ies) liv any proceeds pa	ing at the memlayable to such	ICIARIES: Proceeds are paid to concer's death. If multiple contingent beneficiaries will be divided equally beneficiaries.	eneficiaries are named and	no percentage
stribution is noted, neficiaries, use a co	neficiary(ies) liv any proceeds pa	ing at the memlayable to such	per's death. If multiple contingent be peneficiaries will be divided equally	eneficiaries are named and	no percentage
tribution is noted, neficiaries, use a coereby designate:	neficiary(ies) liv any proceeds papy of this page to	ing at the meml ayable to such to list additional b	per's death. If multiple contingent be beneficiaries will be divided equally beneficiaries.	eneficiaries are named and v. If you have more than t	no percentage Four contingent
stribution is noted, neficiaries, use a concereby designate:	neficiary(ies) liv any proceeds pa ppy of this page to	ing at the meml ayable to such to list additional b	per's death. If multiple contingent be beneficiaries will be divided equally beneficiaries.	eneficiaries are named and v. If you have more than t	no percentage Four contingent
stribution is noted, neficiaries, use a concreby designate:	neficiary(ies) liv any proceeds pa ppy of this page to	ing at the meml ayable to such to list additional b	per's death. If multiple contingent be beneficiaries will be divided equally beneficiaries.	eneficiaries are named and v. If you have more than t	no percentage Four contingent
stribution is noted, neficiaries, use a concreby designate:	neficiary(ies) liv any proceeds pa ppy of this page to	ing at the meml ayable to such to list additional b	per's death. If multiple contingent be beneficiaries will be divided equally beneficiaries.	eneficiaries are named and v. If you have more than t	no percentage Four contingent  Share (mus
stribution is noted, neficiaries, use a conereby designate:	neficiary(ies) liv any proceeds pa ppy of this page to	ing at the meml ayable to such to list additional b	per's death. If multiple contingent be beneficiaries will be divided equally beneficiaries.	eneficiaries are named and v. If you have more than t	no percentage four contingent  Share (mus
stribution is noted, eneficiaries, use a co hereby designate:	neficiary(ies) liv any proceeds pa ppy of this page to	ing at the meml ayable to such to list additional b	per's death. If multiple contingent be beneficiaries will be divided equally beneficiaries.	eneficiaries are named and v. If you have more than t	no percentage our contingent
stribution is noted, neficiaries, use a co nereby designate: Name	neficiary(ies) liv any proceeds property of this page to  Date of Birth	ing at the memlayable to such to list additional b	per's death. If multiple contingent be peneficiaries will be divided equally peneficiaries.  Address	Relationship	no percentage Cour contingent  Share (musequal 100%
stribution is noted, neficiaries, use a conereby designate:  Name  Evoking Previous Despressly reserve the ri	Date of Birth  signation of Beneficiary (ies) live any proceeds payed to be provided by the proceeds payed to be provided by the proceeding t	ing at the memlayable to such to list additional be SSN  SSN  ficiary: By making and further chain	per's death. If multiple contingent be beneficiaries will be divided equally beneficiaries.  Address  Address  In these elections, I hereby revoke all ages at any time I may elect as provided	Relationship  other former designations in by law. If there is no design.	Share (mus equal 100%
evoking Previous Despressly reserve the ri	Date of Birth  signation of Beneficiary (ies) live any proceeds payed to be provided by the proceeds payed to be provided by the proceeding t	ing at the memlayable to such to list additional be SSN  SSN  ficiary: By making and further chain	per's death. If multiple contingent be beneficiaries will be divided equally beneficiaries.  Address  and these elections, I hereby revoke all	Relationship  other former designations in by law. If there is no design.	Share (mus equal 100%
stribution is noted, neficiaries, use a conereby designate:  Name  voking Previous Despressly reserve the ri	Date of Birth  signation of Beneficiary (ies) live any proceeds payed to be provided by the proceeds payed to be provided by the proceeding t	ing at the memlayable to such to list additional be SSN  SSN  ficiary: By making and further chain	per's death. If multiple contingent be beneficiaries will be divided equally beneficiaries.  Address  Address  In these elections, I hereby revoke all ages at any time I may elect as provided	Relationship  other former designations in by law. If there is no design.	Share (mus equal 100%
evoking Previous Despressly reserve the ri	Date of Birth  signation of Beneficiary (ies) live any proceeds payed to be provided by the proceeds payed to be provided by the proceeding t	ing at the memlayable to such to list additional be SSN  SSN  ficiary: By making and further chain	per's death. If multiple contingent be beneficiaries will be divided equally beneficiaries.  Address  Address  In these elections, I hereby revoke all ages at any time I may elect as provided	Relationship  other former designations in by law. If there is no design.	Share (mus equal 100%

Page 2 of 2

by Oklahoma law, and shall not be liable for the validity of the beneficiary designation.

Member Name

to receive this benefit.

TRS shall not be responsible for determining the competency of any member to designate/change beneficiaries, except as otherwise provided