



Instructions

If you die before retirement, your beneficiaries may be eligible for death and/or survivor benefits. Read this information carefully before designating your beneficiary(ies).

It is important that you complete this form and return it to SamCERA. You should designate individuals to be your primary and contingent beneficiaries. The same person cannot be both.

Make sure you understand the difference between “Primary” and “Contingent” beneficiary designations.

- **Primary Beneficiary:** The person(s) or entity(ies) who would receive your benefit upon your death. An entity can receive a lump sum payment only. Depending upon when you die, your surviving spouse, registered domestic partner* or minor children may be eligible to receive a monthly benefit or a one-time lump sum payment. If you do not have a surviving spouse, registered domestic partner, or eligible minor child, any primary beneficiaries you name will receive a one-time lump sum benefit only.
- **Contingent Beneficiary:** The person(s) or entity(ies) who would receive a one-time lump sum payment if all your primary beneficiaries die. *Contingent beneficiaries are only eligible for a lump sum payment of the remaining contributions and interest in your account.*

You can list more than one person as a primary beneficiary and more than one person as a contingent beneficiary. If you list more than one person in each of these categories, those individuals will share any benefit that is received. Because they will share the benefit, you must also indicate the percentage of the benefit that you would like each person to receive. The percentages within each designation must add up to 100%.

If you have a spouse, registered domestic partner, or eligible minor child, their rights and claims to receive a monthly allowance may be superior to and supersede the rights of any other named beneficiary.

If you do not have a spouse, registered domestic partner, or eligible minor child, and you die before retirement, any beneficiaries you name will receive a **one-time lump sum payment only**. They will not be eligible to receive a monthly allowance.

During your employment, it is important to keep your beneficiary designation current to reflect changes in your personal life. For example, you may get married, divorced, or have children. As an active member, you may change your beneficiary designation until the date that you retire. After you retire, you may only change certain beneficiary designations for those persons who are to receive a one-time lump sum payment. If your beneficiaries are not living at the time of your death, or if you do not have a beneficiary designation at the time of your death, a lump sum payment of the contributions and interest in your account will be paid to your estate.

At retirement, you will complete a new beneficiary form and the survivor benefits will be paid in accordance with what retirement option you elect.

*Please note that for the purpose of spousal benefits, domestic partnerships must be registered with the California Secretary of State. (A County of San Mateo Affidavit of Domestic Partnership does not qualify.)

Part 1 – Member Information

Is this a new enrollment or a change of beneficiary? New Change

If you are making a change of beneficiary, this form cancels and replaces all prior applicable designations on file.

| | | | |
|------------------------|-------------|----------------|-----------|
| First Name | | Middle Initial | Last Name |
| Social Security Number | Employee ID | | |

Status: *(Check all boxes that apply)*

- I am single.
- I am widowed.
 Did your spouse/partner die during your SamCERA membership? Yes No
- I am either legally separated, divorced or have terminated a registered domestic partnership.
 Did this occur during you SamCERA membership? Yes No
- I am married, or I am in a registered domestic partnership*.
You must provide the name of your spouse or registered domestic partner below.
- I have been married or in a registered domestic partnership on more than one occasion.
 During your SamCERA membership did you have a divorce, a termination of registered domestic partnership or did your spouse/partner die? Yes No

If you answered Yes to any of the above questions, you must provide the name(s) of all current and former spouses and registered domestic partners*. You must provide copies of any marriage or death certificates, or copies of applicable court orders for all the individuals listed below.

| Name of Spouse/Partner | Date of Marriage/ Partnership | Date of Divorce/ Termination of Partnership | Date of Death |
|------------------------|----------------------------------|---|---------------|
| | | | |
| | | | |
| | | | |



IMPORTANT: You must provide copies of any marriage or death certificates, or copies of applicable court orders! SamCERA will not process this form without them.

*Please note that for the purpose of spousal benefits, domestic partnerships must be registered with the California Secretary of State. *(A County of San Mateo Affidavit of Domestic Partnership does not qualify.)*

Part 2 – Designation of Beneficiary

Name your **Primary Beneficiary(ies)** according to the instructions on the first page of this form.

| | | | | |
|---|--------------|----------------|---------------------------------|--------------|
| Primary Beneficiary | First Name | Middle Initial | Last Name | |
| Gender M <input type="checkbox"/> F <input type="checkbox"/> | Relationship | Date of Birth | Social Security No./Taxpayer ID | Phone Number |
| % of Benefit* | Address | | | |
| | City | | State | Zip |

| | | | | |
|---|--------------|----------------|---------------------------------|--------------|
| Primary Beneficiary | First Name | Middle Initial | Last Name | |
| Gender M <input type="checkbox"/> F <input type="checkbox"/> | Relationship | Date of Birth | Social Security No./Taxpayer ID | Phone Number |
| % of Benefit* | Address | | | |
| | City | | State | Zip |

| | | | | |
|---|--------------|----------------|---------------------------------|--------------|
| Primary Beneficiary | First Name | Middle Initial | Last Name | |
| Gender M <input type="checkbox"/> F <input type="checkbox"/> | Relationship | Date of Birth | Social Security No./Taxpayer ID | Phone Number |
| % of Benefit* | Address | | | |
| | City | | State | Zip |

| |
|--|
| % of Benefit Total* <b style="font-size: 1.2em;">100% |
|--|

**Note: If you name more than one person, you must indicate what percentage of the benefit each individual is to receive. The numbers you have written in the “% of Benefit” boxes must add up to 100%. If you do not indicate a percentage, the benefit(s) will be divided into equal parts.*

Name your **Contingent Beneficiary(ies)** according to the instructions on the first page of this form.

| | | | | | |
|-------------------------------|---|--------------|----------------|---------------------------------|--------------|
| Contingent Beneficiary | First Name | | Middle Initial | Last Name | |
| | Gender M <input type="checkbox"/> F <input type="checkbox"/> | Relationship | Date of Birth | Social Security No./Taxpayer ID | Phone Number |
| % of Lump Sum Payment* | Address | | | | |
| | City | | | State | Zip |

| | | | | | |
|-------------------------------|---|--------------|----------------|---------------------------------|--------------|
| Contingent Beneficiary | First Name | | Middle Initial | Last Name | |
| | Gender M <input type="checkbox"/> F <input type="checkbox"/> | Relationship | Date of Birth | Social Security No./Taxpayer ID | Phone Number |
| % of Lump Sum Payment* | Address | | | | |
| | City | | | State | Zip |

| | | | | | |
|-------------------------------|---|--------------|----------------|---------------------------------|--------------|
| Contingent Beneficiary | First Name | | Middle Initial | Last Name | |
| | Gender M <input type="checkbox"/> F <input type="checkbox"/> | Relationship | Date of Birth | Social Security No./Taxpayer ID | Phone Number |
| % of Lump Sum Payment* | Address | | | | |
| | City | | | State | Zip |

| |
|---------------------|
| % of Payment Total* |
| 100% |

**Note: If you name more than one person, you must indicate what percentage of the payment each individual is to receive. The numbers you have written in the “% of Payment” boxes must add up to 100%. If you do not indicate a percentage, the payment(s) will be divided into equal parts.*

If you are naming a trust or charity as a beneficiary, complete the following section. *Trusts and charities are eligible for a one-time lump sum payment only.*

Trust Charity Please attach a copy of your trust documents.

| | | | |
|---|--------------------------------|-------------------------------------|--------------|
| <input type="checkbox"/> Primary <input type="checkbox"/> Contingent | Name of Trust or Charity | Federal Tax ID Number (for Charity) | |
| | % of Lump Sum Payment* | Name of Trust Administrator | Phone Number |
| | Address of Trust Administrator | | |
| | City | State | Zip |

Part 3 – Sworn Statement

I hereby designate the person(s) and/or entities entered in the Designation of Beneficiary section of this form as beneficiary to my retirement account. I understand that this election revokes any previous applicable beneficiary designation. I declare under penalty of perjury that the information on this form is true and correct.

| | |
|--|------|
| Member Signature (<i>print this form and sign</i>) | Date |
|--|------|

Notification of Spouse/Registered Domestic Partner*

This section must be signed by member’s spouse/registered domestic partner.

California Government Code section §31760.3 requires that the current spouse/registered domestic partner be notified of the selection of benefits or change of beneficiary made by a member.

I, _____, acknowledge my spouse’s/registered domestic partner’s request for a selection or change in beneficiary designation.

| | |
|---|------|
| Spouse or Registered Domestic Partner Signature (<i>print this form and sign</i>) | Date |
|---|------|

*Please note that for the purpose of spousal benefits, domestic partnerships must be registered with the California Secretary of State.