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## BENEFICIARY DESIGNATION FORM

Plan Name

### SECTION A – PARTICIPANT INFORMATION

Name: _____	E-Mail Address: _____
Address: _____	Home Telephone #: _____
Apt/Suite: _____	Date of Birth: _____
City, State, Zip: _____	Social Security #: _____

### SECTION B – BENEFICARY DESIGNATION

**PRIMARY BENEFICIARY:** As a Plan Participant or former Participant, I hereby designate the following person or persons and/or trusts as beneficiaries to be entitled to receive any benefits that become payable from the Plan as a result of my death prior to the full commencement of my Plan benefits:

*You can choose 1. or you can choose from 2. through 6 below.*

1.  100 % to my SPOUSE

*If 1. is chosen, the consent of your spouse is NOT required. You must complete B. and C. below, but your spouse should NOT complete D. If 1. is NOT chosen, you must complete B. and C. and your spouse must complete D.*

2.  \_\_\_\_\_% to my SPOUSE, and

3.  \_\_\_\_\_% to my children per stirpes

4.  \_\_\_\_\_% to my children per capita

5.  The following % to other beneficiaries:

_____%	Name: _____	Relationship: _____
_____%	Name: _____	Relationship: _____

6.  \_\_\_\_\_% to the following trust, created by me on the following date: \_\_\_\_\_.  
 Name of trust: \_\_\_\_\_.  
 The trustees for this trust are \_\_\_\_\_.

**CONTINGENT BENEFICIARY:** In the event a beneficiary designated above fails to survive me, I hereby designate the following person or persons and/or trusts as contingent beneficiaries for that portion of benefits:

1.  \_\_\_\_\_% to my SPOUSE

2.  \_\_\_\_\_% to my children per stirpes

3.  \_\_\_\_\_% to my children per capita

4.  The following % to other beneficiaries:

_____%	Name: _____	Relationship: _____
_____%	Name: _____	Relationship: _____

5.  \_\_\_\_\_% to the following trust, created by me on the following date: \_\_\_\_\_.  
 Name of trust: \_\_\_\_\_.  
 The trustees for this trust are \_\_\_\_\_.

**SECTION C – AFFIRMATION AND ACKNOWLEDGMENT**

All of my previous beneficiary designations, if any, are null and void. I affirm that, to the best of my knowledge, there is no court order (other than a Qualified Domestic Relations Order) that assigns any of my interest in the Plan to any other person. I hereby affirm that

- [ ] I am either not married or I have a court order recognizing my legal separation from my spouse; and if I was ever previously married, I have a valid decree of divorce from all ex-spouses. I acknowledge that any designation made on this form today may be invalidated upon my marriage, and agree to keep the Plan Administrator informed of any changes to my marital status.
- [ ] I am presently legally married. I shall keep the Plan Administrator informed of any change to my marital status. Unless my spouse is the only primary beneficiary, my spouse has completed the CONSENT portion of this form below. If I am not yet age 35, I acknowledge that I will have to re-obtain the consent of my spouse to my naming a non-spouse primary beneficiary when I turn age 35.

I acknowledge that I need to fill out a new beneficiary designation form in order to change any designations made on this form.

Name of Participant: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Employer: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*Your spouse should NOT complete section D if you selected B.1 above.*

**SECTION D – NOTARIZED SPOUSAL CONSENT**

I hereby consent to the distribution of all (or the portion specified by my spouse on the Designation of Beneficiary form) of the benefits payable from the Plan on account of the Participant’s death to the primary beneficiary named on the Designation of Beneficiary form. I acknowledge that (1) the effect of my consent is to cause all or a portion of the Plan's death benefits to be paid to a beneficiary other than me, (2) that the Participant's designation of a primary beneficiary other than me is not valid unless I consent to it, and (3) that my consent is irrevocable unless the Participant subsequently revokes his or her waiver, in which event my consent will again be required in order for the Participant to name a non-spouse beneficiary. If my spouse has waived the pre-retirement surviving spouse annuity, I acknowledge that, but for my consent, all or a portion of my spouse's benefits would be payable to me in the form of an annuity over my life, and I hereby irrevocably relinquish that right (however, should the Participant revoke his or her waiver at any time, my consent will again subsequently be required to again waive this requirement).

**SPOUSAL CONSENT**

Name of Spouse : \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**WITNESS:**

On this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, personally appeared before me \_\_\_\_\_,

represented as the spouse of \_\_\_\_\_, who acknowledged and consented to the

elections on this form as his/her voluntary act and deed.

NOTARY  
SEAL

NOTARY PUBLIC: \_\_\_\_\_

My commission expires on: \_\_\_\_\_