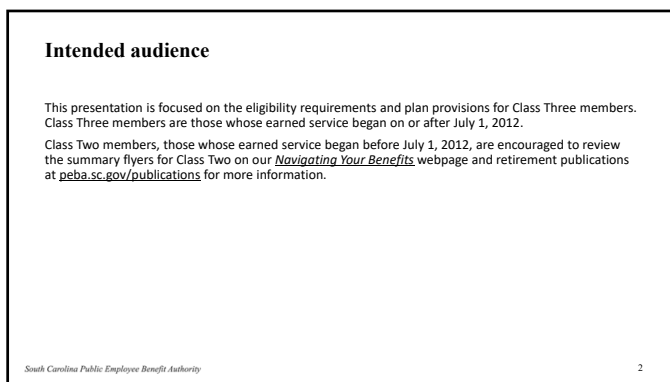
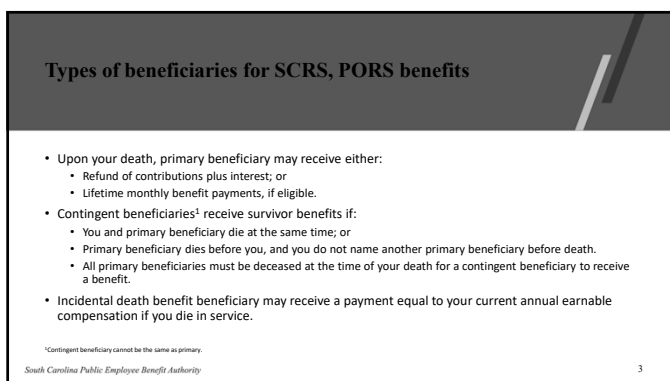




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Beneficiaries for State ORP

- Must name primary and contingent beneficiaries for your retirement account directly with your selected service provider.
 - Upon your death, your beneficiary may be entitled to receive the cash value of your account but must file a claim with your service provider.
- Must name an incidental death beneficiary with PEBA, because your beneficiary might qualify for the active member incidental death benefit payment upon your death.

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How to name your beneficiaries

- Easiest way to name beneficiaries with PEBA is online using Member Access.
 - Refer to the Designating Active Member Beneficiaries flyer.
 - To designate a trust as your beneficiary, you must complete Form 1103.
- You can also complete the appropriate form, but forms require a notary signature and additional processing time:
 - Active Member Beneficiary Form (Form 1102).
 - Beneficiary/Trustee Designation Form (Form 1103); trust must already exist.
 - State ORP Active Incidental Death Benefit Beneficiary Designation (Form 1106).
- You can name multiple beneficiaries.
 - Benefits are split equally if multiple beneficiaries are named.

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When beneficiary defaults to estate

- Occurs when:
 - PEBA and/or your State ORP service provider does not receive a beneficiary designation online or via a beneficiary form;
 - A section of beneficiary form is left blank or is not completed properly; or
 - All named beneficiaries predecease employee, and you do not name a new beneficiary.
- Ensure you receive a confirmation letter from PEBA and/or your State ORP service provider listing your beneficiaries.

It is good practice to review and update your beneficiary information periodically, especially if you have had an important life event.

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Disclaimer

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