

Online Beneficiary Maintenance.

Naming a beneficiary under your employer's retirement plan is an important step in making sure that upon your death your assets are distributed to the individual(s) of your choice.

Important note before you begin: If you are married, your spouse must be designated as your primary beneficiary to complete your election online. If you choose to designate someone other than your spouse, please "Go to My Account" and "Forms" on the participant website to download a paper copy of the form.



If you have difficulty entering the information, or have questions, please contact a Customer Service Associate at (800) 584-6001.

- Step 1** After logging in to your account, select **"Go to My Account"**.
- Step 2** Under the **"Personal Information"** menu, select **"Add/Edit Beneficiary"** and follow the navigation instructions provided on the website.
- Step 3** Enter the requested information. Items marked with an asterisk (*) are required. If married, to enter information online, your spouse must be your primary beneficiary. If married and you want someone other than you spouse as primary beneficiary, you must fill out a paper beneficiary form located in the Forms section.
- Relationship Drop Box**– select Spouse
Type Drop Box– select **Primary**
Percent – fill in the box with **100** and highlight the radio button. Complete the remaining information, and click **Submit**.
- Step 4** To add a contingent beneficiary, click **"Next"** and then click **"Add Beneficiary"** and repeat the process.
- Relationship Drop Box** – select the appropriate option - e.g. Son, Daughter.
Type Drop Box – select **Contingent**
Percent – enter the appropriate percentage or select **Equal** percent to all, if you want to split evenly among multiple contingent beneficiaries.
- Complete the remaining information, and click **Submit**. Repeat this process until you have entered all contingent beneficiaries.
- Step 5** When you have entered all desired beneficiary/contingent beneficiary information, be sure to click **Save**, located on the lower right hand side of the screen.



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