

IBEW LOCAL UNION NO. 654 BENEFIT FUNDS BENEFICIARY DESIGNATION FORM
PLEASE PRINT ALL REQUESTED INFORMATION

SECTION I: DESIGNATE A FUND

☐ HEALTH & WELFARE

☐ DB PENSION

☐ DC ANNUITY

☐ ALL FUNDS

PLEASE NOTE: If you do not designate a specific fund, the beneficiary listed will be used for all funds.

SECTION II: PARTICIPANT INFORMATION

NAME:		SSN:	
ADDRESS:		CITY, ST ZIP:	
TEL:	☐ HOME ☐ CELL	EMAIL:	
DOB:	STAT:	☐ SINGLE NEVER MARRIED ☐ DIVORCED NOT MARRIED	☐ MARRIED ☐ WIDOWED

SECTION III: BENEFICIARY DESIGNATION

- If you are unmarried, you may name any person as Beneficiary.
- If you are married, your Spouse is your 100% Beneficiary (whether or not you have named your spouse as your Beneficiary) unless your Spouse completes the Spousal Consent section below in the presence of a Notary Public.
 - ☐ My spouse is my primary beneficiary.
- Please see your Fund Summary Plan Description for detailed information on naming a Beneficiary.

BENEFICIARY 1:

NAME:		SSN:	
DOB:	RELATION:	☐ SPOUSE ☐ SIBLING ☐ PARENT ☐ CHILD ☐ OTHER:	
PERCENTAGE OF BENEFIT:		☐ PRIMARY BENEFICIARY ☐ CONTINGENT BENEFICIARY	

BENEFICIARY 2:

NAME:		SSN:	
DOB:	RELATION:	☐ SPOUSE ☐ SIBLING ☐ PARENT ☐ CHILD ☐ OTHER:	
PERCENTAGE OF BENEFIT:		☐ PRIMARY BENEFICIARY ☐ CONTINGENT BENEFICIARY	

To name more than two Beneficiaries, please list the information on a separate piece of paper and attach it to this form.

SECTION III: PARTICIPANT VERIFICATION AND SIGNATURE

I hereby revoke any previous beneficiary designation and designate the beneficiary or beneficiaries listed above for the percentage listed.

Signature: _____ Date Signed: _____

SPOUSAL CONSENT

I declare that I am the participant's current spouse and I voluntarily consent to the non-spouse beneficiary designation that appears above. I understand and acknowledge that this designation will cause the benefits in the participant's account to be paid to someone else instead of me upon the participant's death.

Signature of Spouse

Date Signed

Notary Seal and Signature

Retired/Active "A" Members of the IBEW