



Your pension plan has an automatic survivorship benefit for a spouse and minor children. You may name a beneficiary(ies) here if you prefer that any lump sum payment be made to a specific individual or institution. See guide on next page for more information.

1. Information about you

Last name	First name	MI	Account ID or SSN
Mailing address		Daytime phone number	
City		State	Zip code
Spouse's name		Spouse's date of birth	

2. Designation of beneficiary by name

See the guide on page 2 of this form for more information about primary and contingent beneficiary designations.

Primary beneficiary: I hereby designate the following person(s) as primary beneficiary(ies) of my account.

Name of primary beneficiary	Relationship	Address	Date of birth

Contingent beneficiary: If there are no primary beneficiary(ies) at my death, I hereby designate the following person(s) as contingent beneficiary(ies) of my account.

Name of contingent beneficiary	Relationship	Address	Date of birth

You may attach an additional sheet of paper if there is not enough space to list all beneficiaries.

3. Required signature (please sign below)

I understand that upon my death any lump sum benefit payable from this account will be made to the surviving person(s) or entity indicated on this form. This beneficiary designation supersedes any previous designations I have made.

Participant Signature _____ Date (Required) _____ / _____ / _____
Month Day Year

Beneficiary Designation *Guide*

About your beneficiary designation

Your Minnesota State Retirement System (MSRS) pension plan has an automatic survivorship benefit for a spouse and minor children. Your spouse may receive a lifetime benefit. If you have no spouse, your minor children are eligible to receive a benefit for a limited time. Visit our website for more information. If you have no spouse or qualifying children, payment of your pension deductions plus interest is paid to your estate. You may name a beneficiary(ies) on this form if you prefer that any lump sum payment be made to a specific individual or institution.

Purpose of a beneficiary designation

A beneficiary designation determines settlement of your MSRS pension plan in the event of your death. Generally, a beneficiary designation applies if your death occurs:

- Before you begin collecting an MSRS pension benefit payment
- While collecting an MSRS pension benefit, but you elected the Single-Life option
- While collecting an MSRS disability benefit, but you did not choose a survivor option

A beneficiary can be a person, estate, trust, or charitable organization.

Effective date of this request

A valid beneficiary designation for your MSRS pension plan must be on file with MSRS prior to death. You may change or revoke a beneficiary designation at any time by submitting to MSRS a new *Beneficiary Designation* form. Once a properly completed *Beneficiary Designation* is received by MSRS, it supersedes any prior designations on file with MSRS. The beneficiary designation remains in effect until you submit a new designation or until there are no further benefits payable from this account.

If you have multiple MSRS-administered pension plans

This beneficiary designation is for the State Patrol, Judges, Legislators and Elected Officials pension plans. Your designation automatically applies to all of these plans unless you specify on the form to which plan the designation applies.

This beneficiary designation does not apply to the General Employees, Correctional, or Unclassified Retirement Plans. You must complete a separate form for those plans. To obtain that beneficiary form, visit our website at www.msrs.state.mn.us or call MSRS.

Divorce

If you divorce, MSRS is required by MN Stat. 524.2-804 to remove a beneficiary designation naming your former spouse. Your other beneficiaries remain valid. To re-designate a former spouse or name new beneficiaries after a divorce, a *Beneficiary Designation* form must be completed and returned to MSRS. Keep in mind, the court may require you to reinstate your former spouse as a beneficiary.

Information about you

The information you provide on this form is for internal use only by MSRS. You are not required to provide the information but without it, we may not be able to change your beneficiary as requested.

Primary beneficiary

In the event of your death, benefits will be paid in accordance with state statute to the primary beneficiary(ies) named on this form. A beneficiary can be person, estate, trust or charitable organization. **Note:** If you name a trust, you must provide a photocopy of the first page and signature page of the trust document.

If you name multiple primary beneficiaries, the account balance will be divided equally among the surviving primary beneficiaries. If a primary beneficiary predeceases you, the benefit will be paid in equal portions to the surviving primary beneficiary(ies).

If you are not survived by a primary beneficiary, the benefit will be paid to the contingent beneficiary(ies). If there is no contingent beneficiary, the benefit will be paid to your estate.

Contingent beneficiary

If you are not survived by a primary beneficiary, the benefit will be paid in accordance with state statute to the contingent beneficiary(ies) named on this form. A beneficiary can be person, estate, trust or charitable organization. **Note:** If you name a trust, you must provide a photocopy of the first page and signature page of the trust document.

If you name multiple contingent beneficiaries, the payment will be divided equally among the surviving contingent beneficiaries. If a contingent beneficiary predeceases you, the benefit will be paid in equal portions to the surviving contingent beneficiary(ies).

If neither a primary nor contingent beneficiary survives you, the benefit will be paid to your estate.

Required signature

Your signature acknowledges that you have read the *Beneficiary Designation* form and this *Beneficiary Designation Guide* and intend the beneficiary indicated on the form as of the date of your signature. Your signature voids all beneficiary designations you have filed with MSRS.

MSRS will reject your form if it lacks the required signature or is future-dated.

Send completed form to:



Minnesota State Retirement System
60 Empire Drive, Suite 300
St. Paul, MN 55103-3000



Telephone: 651.296.2761
Toll-free: 1.800.657.5757, option 3

Teletypewriter users and telecommunications-device-for-the-deaf (TDD) users call the Minnesota Relay Service at 1.800.627.3529 and ask to be connected to MSRS at 651.296.2761.