

**THE DIOCESE OF SACRAMENTO  
LAY EMPLOYEES PENSION PLAN  
BENEFICIARY DESIGNATION**

**When filed with the Plan Administrator prior to your death, this designation supersedes and replaces all previous designations under this Plan.**

Name: \_\_\_\_\_ Parish/School/Agency: \_\_\_\_\_

Social Security No. \_\_\_\_\_ City: \_\_\_\_\_

**IMPORTANT NOTICE**

If you are **legally married**, your primary beneficiary is automatically your spouse. Neither you nor your spouse may elect otherwise.

If **you are not married**, your primary beneficiary is any person that you designate to receive death benefits under the plan, if any are payable.

Regardless of your marital status, it is important to designate a beneficiary – and to keep your designation up-to-date. If you fail to designate a beneficiary – or your beneficiary is not living at the time of your death – then the benefits due will be paid in accordance with the plan and the plan’s administrative procedures.

Should your spouse or other beneficiary fail to survive you by at least 30 days – or if you and your beneficiary die in a common accident or disaster – you will have been deemed to have died last.

Beneficiary designation. See page two for sample designations. Attach a separate page if more space is necessary.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Beneficiary Address \_\_\_\_\_  
Street Address

City State Zip

Use separate page if more than one address and indicate name of each addressee.

**EMPLOYEE SIGNATURE**

I hereby make the above designation, revoking and replacing all previous designations under this plan. I understand if I am legally married at my death, my spouse has priority over any other claim presented.

Signature of Employee \_\_\_\_\_ Date \_\_\_\_\_

**ADMINISTRATOR'S RECORD OF RECEIPT**

Date Received: \_\_\_\_\_ Initials: \_\_\_\_\_

**Original To:** Office of Lay Personnel

**Copy To:** Employee / Retiree

## INSTRUCTIONS

1. Use this form to designate or change your primary and/or secondary beneficiary.
2. When your relationship to your beneficiary is other than by blood, show your relationship as "nonrelative".
3. Where more than one primary and/or secondary beneficiary is designated, the amount to be paid to each beneficiary must be clearly set forth by designating fractions or portions to be received.
4. Your secondary beneficiary will receive a benefit only if (a) your primary beneficiary dies before you, or (b) your spouse dies before receiving the total survivor benefit.
5. Common Accident or Disaster: The plan provides that if you and your spouse or other beneficiary dies in a common accident or disaster, you will be deemed to have died last.
6. If your death occurs and a minor is designated, or your beneficiary is incapable of giving valid receipt, the Plan Administrator may direct that payment be made to the person or institution responsible for the care and maintenance of such individual.
7. The proper wording for typical nominations of beneficiary is shown below. In the event none of the following nominations provide the disposition desired, you should consult your attorney.

	<u>Type of Beneficiary</u>	<u>Language To Be Used</u>	
	1. Estate.	1. Estate.	
	2. One Primary Beneficiary.	2. Peter Jones, father.	
	3. Two Primary Beneficiaries.	3. Peter Jones, father and Anna Jones, mother, equally, or the survivor.	
4.	4. Three or More Primary Beneficiaries.	4. Peter Jones, father, Anna Jones, mother, and Mary Jones, daughter, or the survivors, equally or the survivor.	
5.	5. One Primary Beneficiary and One Secondary Beneficiary.	5. Dorothy Q. Jones, spouse, if living, otherwise Mary Jones, daughter.	
	<b>6. One Primary Beneficiary and Two Secondary Beneficiaries.</b>	<b>6. Dorothy Q. Jones, spouse, if living, otherwise Mary Jones, daughter, Quincy Jones, son, equally, or the survivor.</b>	
	<b>7. One Primary Beneficiary and Three or more Secondary Beneficiaries.</b>	<b>7. Dorothy Q. Jones, spouse, if living, otherwise Mary Jones, Quincy Jones, and Edna Jones, children, or the survivor or survivors, equally.</b>	
	<b>8. One Primary Beneficiary and Unnamed Children as Secondary Beneficiaries.</b>	<b>8. Dorothy Q. Jones, spouse, if living, otherwise the children born of the marriage of the designator and said wife, or the survivor, or the survivors, equally.</b>	
	9. Two Primary Beneficiaries and One Secondary Beneficiary.	9. Peter Jones, father, and Anna Jones, mother, equally, or the survivor, if either survives; otherwise Mary Jones, daughter.	
	10. Two Primary Beneficiaries in Unequal Beneficiary.	10. Peter Jones, father, as to the three-fourths (¾), and Anna Jones, mother, as to one-fourth (¼), or the survivor.	
	11. Trustee or Business Partner.	11. _____ (trustee or business partner)	
	12. Revocable Inter Vivos Trust.	12. Surviving Trustee(s) under the Trust Agreement Establishing the (Name of trust, such as "Peter and Dorothy Jones Revocable Trust") dated [date trust agreement signed].	

Designations in bold type mean your spouse is your primary beneficiary

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### PLAN ADMINISTRATOR'S ADDRESS

Benefit Manager  
 Diocese of Sacramento  
 2110 Broadway  
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