

Instructions for Judge Member Service: Pre-Retirement Designation of Beneficiary Packet

It is important that you file a **Designation of Beneficiary form with PERS for each program in which you are a member.** If you die before retirement and there is no designation of beneficiary on file, distribution will be made in accordance with statute. Forms for all programs can be found on the PERS website at <http://oregon.gov/pers>.

Surviving spouse pension

The surviving spouse of a judge member is the automatic recipient of a surviving spouse pension under ORS 238.565 unless a prenuptial or antenuptial agreement stating otherwise has been filed with PERS. You may elect to have a former spouse receive all or a portion of the pension payable to a surviving spouse. See ORS 238.565(8). To make this election, you must also complete a [Judge Member Election of Former Spouse as a Pension Recipient form](#).

General instructions

- Type or print clearly in dark ink. Illegible forms may be returned, which could delay your request.
- Do not change anything on the form; alterations will void the form.
- Sign and date the statement at the bottom of the form, and mail or fax the form to PERS.

Section A: Member information

Fill in the personal information block completely.

Providing your Social Security number (SSN) is voluntary. It will be used for confirmation purposes. If you choose not to supply your SSN, it may take PERS staff longer to process your form.

If you do not know your PERS number, leave it blank.

Section B: Spouse information

Provide information on your current spouse in the space provided.

If you are electing to have a former spouse receive all or a portion of the pension payable, check the box in Section B. You must also complete a [Judge Member Election of Former Spouse as a Pension Recipient](#).

Section C: Beneficiary designation

Check **EITHER** a **standard** beneficiary designation **OR** a **specific** beneficiary designation.

If you do not have a spouse or you have provided PERS with a prenuptial or antenuptial agreement or your spouse predeceases you, the beneficiary named here will receive a lump-sum payment of any remaining balance of your judge member account at the time of your death.

You have the following options when naming a beneficiary. You can name:

1. any person or persons (complete Section C),
2. the personal representative of your estate (complete Section D), or
3. a trustee of the trust you designate (complete Section E).

If your beneficiary or beneficiaries predecease you, your unpaid judicial account balance will be paid to your remaining beneficiary or beneficiaries. If no beneficiaries remain, your estate will be paid.

Naming a specific beneficiary;

1) You can name one or more primary beneficiaries. If you designate only one primary beneficiary, he/she will receive 100 percent of your death benefits.

2) If you designate multiple beneficiaries, you can decide what portion of your death benefit will go to each beneficiary.

- If you assign percentages to each primary beneficiary, the total percentages must equal 100 percent.
- If you do not assign a percentage to each primary beneficiary named, each will share equally.

Example (Sample of information a member would enter is in bold italics)

Specific beneficiary	Date of birth (optional)	Relationship (optional)	Percentage	
Beneficiary name Mary Public	(mm/dd/yyyy) 06/01/1961	Daughter	NOTE The total of the percentages must equal 100 percent.	25%
Beneficiary name John Public	(mm/dd/yyyy) 04/04/1958	Son		25%
Beneficiary name Sue Public	(mm/dd/yyyy) 10/01/1956	Sister		15 %
Beneficiary name Gertrude Public	(mm/dd/yyyy) 05/12/1935	Mother		35%

Section D: Estate designation - I designate my estate as my beneficiary.

If you want to designate your estate as the beneficiary, enter the name of the personal representative and the address in the space provided.

Section E: Trust designation - I designate my trust as my beneficiary.

If you want to designate your trust as the beneficiary, enter the legal name of the trust, the name of the trustee, the address, and the date the trust was established in the space provided.

Section F - Member signature (required)

Your signature is required. Be sure to sign and date where indicated.



Judge Member Service: Pre-Retirement Beneficiary Designation

This form is strictly for judge members. Call PERS or visit our website if this is not the form you need.

Section A: Member information (Type or print clearly in dark ink. Illegible forms could be returned to you. Which could delay your request.)

First name	MI	Last name	Social Security number*
Mailing address (street or PO box)			PERS number (optional)
City	State	Zip	Country
			Day phone number

Section B: Spouse information

First name	MI	Last name	Social Security number
Mailing address (street or PO box)			Date of birth (mm/dd/yyyy)
City	State	Zip	Country
			Day phone number

Optional Election. I am also electing to have all or a portion of my surviving spouse's pension paid to a former spouse.

Yes. You must complete a [Judge Member Election of Former Spouse as a Pension Recipient form](#).

Section C: Beneficiary designation

I would like to use the **standard designation**.

I want to designate a **specific person or persons** as my beneficiary(ies).

Do not fill out this section if you choose the standard beneficiary designation			
Specific beneficiary	Date of birth (optional)**	Relationship (optional)**	Percentage
Beneficiary name	(mm/dd/yyyy)		%
Beneficiary name	(mm/dd/yyyy)		%
Beneficiary name	(mm/dd/yyyy)		%
Beneficiary name	(mm/dd/yyyy)		%

NOTE
The total of the percentages must equal 100 percent.

**This information helps PERS locate the person you designate.

Section D: Estate designation - I designate my estate as my beneficiary.

I designate my estate as my beneficiary.

Name of personal representative: _____

Section E: Trust designation - I designate my trust as my beneficiary.

I designate my trust as my beneficiary.

Legal name of trust (e.g., The Sara Smith Living Trust): _____

Name of trustee: _____

Address: _____ Date trust established: _____

Section F - Member signature (required)

I revoke all previous judge member beneficiary designations.

 _____
 Applicant signature (do not print)

 Date

*Providing your Social Security number (SSN) is voluntary. It will be used for confirmation purposes. If you choose not to supply your SSN, it may take PERS staff longer to process your form.

In compliance with the Americans with Disabilities Act, PERS will provide help filling out this form upon request. You may request help by calling 503-598-7377, toll free 888-320-7377, or TTY 503-603-7766.