

PERS Tier One/Tier Two Beneficiary Changes/Restrictions Due to Divorce

Section A: Member and alternate payee (AP) information (Type or print clearly in dark ink.)

Member name	PERS number (optional)
AP name	

If the court allows the member to change his/her beneficiary or requires beneficiary restrictions, check the boxes that apply, attach this form as an exhibit to your court order, and submit the form to the courts. Send your final certified court order to PERS.

Section B: Non-retired member

- Member is required to elect a survivorship option. Is the member restricted to a specific survivorship option?
 Yes No If yes, which option? _____.
- Member is required to designate the AP as beneficiary.
- Member is required to designate the AP as beneficiary for _____ percent of any survivorship benefit. Any remaining share will be payable to the member's beneficiary.
- Member is required to name any minor children as beneficiary.

Section C: Retiree with survivorship option; AP is currently named beneficiary

- Retiree is allowed to change his/her beneficiary due to divorce.

Note: The member must submit to PERS a written request to change beneficiary. The request should include the full name of the new beneficiary, address, Social Security number (if available), and a copy of proof of the new beneficiary's date of birth. Current and future benefits may increase or decrease depending on the age of the new beneficiary. The beneficiary change will be effective the first of the month after the month in which PERS receives a valid request to change the beneficiary, and it will be payable the first of the following month.

Per ORS 238.465(2)(d), PERS can only change a survivor beneficiary after retirement due to divorce if the current beneficiary is the ex-spouse and the ex-spouse has been awarded an interest in the member's retirement benefits.

- Retiree elected option 2A, 3A, L2A, L3A, and retiree is allowed to pop up to Option 1. The retiree must submit a letter to PERS requesting a pop up to Option 1.

Section D: Retiree with non-survivorship option

- Retiree is required to name AP as beneficiary.
- Retiree is required to designate the AP to receive _____ percent of any death benefit.
- Retiree is required to name any minor children as beneficiary.

Office use only		
<input checked="" type="checkbox"/> PERS	<input type="checkbox"/> OPSRP	<input type="checkbox"/> IAP
<input type="checkbox"/> Member <input type="checkbox"/> Alternate payee		
<input type="checkbox"/> Cross reference member SSN		