

PERS Tier One/Tier Two Beneficiary Restrictions Due to Divorce or Dissolution of Registered Domestic Partnership

This form is strictly for Tier One/Tier Two member beneficiary restrictions when there was either a
Separate Account Award or No Award of Tier One/Tier Two benefits.

Section A: Member and former spouse/Registered Domestic Partner (RDP)/alternate payee (AP) information

Member name	PERS ID (optional)
Former spouse/RDP/AP name	

Any Tier One/Tier Two beneficiary restrictions are to be indicated below by checking the boxes that apply.

Section B: Non-retired member

- ☐ Member is required to designate the former spouse/RDP/AP as the sole primary **pre-retirement** beneficiary.
 - ☐ Member is required to designate the former spouse/RDP/AP as a primary **pre-retirement** beneficiary for _____%.
 - ☐ Member is required to name any minor children as primary **pre-retirement** beneficiaries.
The requirement to designate minor children automatically expires upon minors reaching the age of majority.
 - ☐ **At retirement** the member is required to elect a survivorship option and name the former spouse/RDP/AP as primary beneficiary.
 - ☐ The former spouse/RDP/AP will be the sole survivorship beneficiary.
 - ☐ The AP/former RDP will be the primary beneficiary for _____% of the survivorship benefit. (**This cannot be selected in cases of No Award.** A survivorship beneficiary benefit can only be divided when an AP/former RDP has received an award.)
- Is the member required to elect a specific survivorship benefit option?
- ☐ Yes ☐ No If yes, which option? _____.

Section C: Retired member with survivorship increase option and former spouse as beneficiary

Retirees who elected a survivorship increase option at retirement and designated their spouse as beneficiary are eligible to “pop up” to the higher paying Option 1 when the marriage is dissolved unless restricted by court order.

If the retiree elected option 2A, L2A, 3A, or L3A, is the retiree **restricted** from popping up to the Option 1 benefit?

- ☐ Yes (**The retiree is allowed to pop up unless this box is checked.**)

If the retiree is restricted from popping up or the retiree does not request a pop up due to divorce, the former spouse/RDP will remain the beneficiary. A legal separation or dissolution of a registered domestic partnership does not qualify and is automatically restricted from pop up regardless of whether the “Yes” box is unchecked.

Section D: Retiree with non-survivorship option (Refund Annuity, 15 Year Certain, Lump-sum installments)

- ☐ Retiree is allowed to update **retirement** beneficiary designation without obtaining consent of former spouse/RDP.
- ☐ Retiree is required to designate the former spouse/RDP as the sole primary **retirement** beneficiary.
- ☐ Retiree is required to designate the former spouse/RDP as a primary **retirement** beneficiary for _____%.
- ☐ Retiree is required to name any minor children as primary **retirement** beneficiaries.
The requirement to designate minor children automatically expires upon minors reaching the age of majority.