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Divorce: Survivorship Beneficiary Change Estimate Request

This form is to request an estimate for a survivorship beneficiary change. This form may only be used by retired members who have an administrable **court order on file with PERS that provides an award to an alternate payee (AP) and allows a beneficiary change** for one of the following retirement options:

- Tier 1/Tier 2 survivorship options: Option 2, Option 2A, Lump-Sum Option 2, Lump-Sum Option 2A, Option 3, Option 3A, Lump-Sum Option 3, Lump-Sum Option 3A.
- OPSRP survivorship options: Full-Survivorship Option, Full-Survivorship Increase Option, Half-Survivorship Option, Half-Survivorship Increase Option.

If your new beneficiary is younger than your original beneficiary, it is recommended to get an estimate **before** changing your beneficiary.

Section A: Member information

Full name	Social Security number*	PERS ID (optional)
Mailing address		Personal email

Section B: New beneficiary information (for estimate only, this does not change your current beneficiary)

You may only list one person. Estates, trusts, charities, and alternate beneficiaries cannot be listed.

Full name (required)	Social Security number* (requested)	Date of birth (required)	Relationship (required)
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Section C: Member statement (Signature required. Electronic and digital signatures are not accepted)

By my signature below, I acknowledge that:

- I am **requesting an estimate** to change my survivorship beneficiary. Submitting this request for estimate will **not** change my beneficiary.
- If I request to change my survivorship beneficiary due to divorce, it is a one-time irrevocable change.
- If I request to change my survivorship beneficiary, my monthly benefit will be re-calculated based on a blended factor of my original beneficiary and my new beneficiary's ages which may result in an increase or a decrease in my monthly benefit.
- **My beneficiary change will not be effective until the first of the month after PERS receives a valid request.** The re-calculated benefit amount is payable the first of the month after the effective date. I will receive an invoice or a retroactive payment for any overpaid or underpaid benefits that occur while my request is being processed.

Member's signature (do not print, must be a handwritten signature)

Date

To request a survivorship beneficiary change due to divorce, complete and submit the Divorce: Post-Retirement Survivorship Beneficiary Change form.

*Providing your Social Security number (SSN) is voluntary. It will be used for confirmation purposes. If you choose not to supply your SSN, it could 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 can request help by calling 888-320-7377 or TTY 503-603-7766.