



Alternate Payee Tier One/Tier Two Post-Retirement Beneficiary Designation

This form is strictly for alternate payees who meet one of the following criteria:

- Retired under the Refund Annuity or 15-Year Certain options.
- Retired under the Total Lump Sum or Lump Sum Option 1 options and are still receiving lump-sum installments.
- Are in the process of retiring and need to designate a beneficiary under one of the options above or under Option 1. Under Option 1 or Refund Annuity, if an alternate payee dies after their effective retirement date but before their first benefit payment is due, the death is considered a pre-retired death. In this event, PERS will use the beneficiary on this designation FORM as YOUR pre-retirement beneficiary DESIGNATION.

Section A: Alternate payee (AP) information

First name		MI	Last name		PERS ID (optional)
Mailing address (street or PO box)				Country	Social Security number (SSN)*
City			State	ZIP code	Date of birth (mm/dd/yyyy)
Home phone number	Work phone number	Cell phone number		Personal email	

Section B: Beneficiary determination information

Upon your death, PERS will pay beneficiary benefits, if any, per the Alternate Payee Tier One/Tier Two retirement or post-retirement beneficiary designation on file.

If you do not have a designation on file for your AP Tier One/Tier Two benefit or your designated beneficiary predeceases you, PERS will pay per the statutory order in effect at the time of your death. The statutory order in effect at the time of publication of this form is: (A) Surviving spouse; if none, to (B) **Surviving children, in equal shares; if none, to (C) Your estate.

**Biological and adopted children are considered “children.” If your biological children are adopted by someone else, they are not considered your “children.” Stepchildren are not considered your “children” unless legally adopted.

Section C: Designation instructions

- You may name persons, charities, trusts, or your estate as beneficiary.
- Providing the requested information assists PERS in locating your beneficiary after your death.
- If you need to add more beneficiaries, attach an additional sheet of paper that includes all the same information listed in the table for each beneficiary. Include your name and SSN* at the top of each additional sheet. Your signature is required on each additional sheet.
- The percentages assigned to primary beneficiaries must total 100%. Example, if you want to name 3 beneficiaries as equally as possible, use 33.33%, 33.33% and 33.34%.
- If you do not assign percentages, the beneficiaries on that level (primaries or alternates under each specific primary) will share equally.

*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 toll free 888-320-7377 or TTY 503-603-7766.

Section C: Designation instructions - continued

- You can name one or more alternate beneficiaries for each of your primary beneficiaries. The alternates will receive the primary beneficiary's share if the primary beneficiary predeceases you. Note: The percentage you designate for the alternates must equal the percentage you assigned to the primary beneficiary (i.e., if you designate 50% to primary beneficiary #1 and have two alternates for that beneficiary, the percentages for the two alternates must total 50%).
- If you name a trust as a beneficiary, write the complete name of the trust in the 'full name' field.
- If you are naming your estate as beneficiary, write "My estate" in the 'full name' field. You are not permitted to name an alternate beneficiary for your estate.

Example designation:

Primary beneficiary #1						If surviving; otherwise, to #1 alternate beneficiary(ies).	
#1	Full name <i>Jane Smith</i>		Social Security # <i>000-00-0000</i>	Date of birth <i>6/15/1982</i>	Phone <i>503-555-1212</i>	Percentage 50 %	
	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Charity <input type="checkbox"/> Trust	Email or address <i>janesmith@gmail.com</i>			Relationship <i>Daughter</i>		
Alternate beneficiary(ies) for Primary #1 Alternate percentages must equal percentage assigned to Primary #1							
#1a	Full name <i>Mary Brown</i>		Social Security # <i>000-00-0000</i>	Date of birth <i>8/25/1956</i>	Phone <i>808-555-4111</i>	Percentage 30 %	
	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Charity <input type="checkbox"/> Trust	Email or address			Relationship <i>Sister</i>		
#1b	Full name <i>Animals Win</i>		Social Security #	Date of birth	Phone <i>888-555-1111</i>	Percentage 20 %	
	<input type="checkbox"/> Person <input type="checkbox"/> Estate <input checked="" type="checkbox"/> Charity <input type="checkbox"/> Trust	Email or address <i>000 Dalmatian Dr., Portland, OR</i>			Relationship		

Primary beneficiary #2						If surviving; otherwise, to #2 alternate beneficiary(ies).	
#2	Full name <i>George Smith</i>		Social Security # <i>000-00-0000</i>	Date of birth <i>4/15/1975</i>	Phone <i>808-555-1612</i>	Percentage 50 %	
	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Charity <input type="checkbox"/> Trust	Email or address <i>000 Ocean Way, Hilo, HI</i>			Relationship <i>Son</i>		
Alternate beneficiary(ies) for Primary #2 Alternate percentages must equal percentage assigned to Primary #2							
#2a	Full name <i>Christina Smith</i>		Social Security # <i>000-00-0000</i>	Date of birth <i>2/19/1997</i>	Phone <i>808-555-6641</i>	Percentage 25 %	
	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Charity <input type="checkbox"/> Trust	Email or address <i>000 Ocean Way, Hilo, HI</i>			Relationship <i>Granddaughter</i>		
#2b	Full name <i>Jacob Smith</i>		Social Security # <i>000-00-0000</i>	Date of birth <i>6/15/1988</i>	Phone <i>808-555-1620</i>	Percentage 25 %	
	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Charity <input type="checkbox"/> Trust	Email or address <i>000 Ocean Way, Hilo, HI</i>			Relationship <i>Grandson</i>		

- The percentages of #1 and #2 primary beneficiaries add up to 100% (50+50=100).
- The percentages of #1a and #1b alternate beneficiaries add up to the #1 primary's percentage (30+20=50).
- The percentages of #2a and #2b alternate beneficiaries add up to the #2 primary's percentage (25+25=50).

It is not necessary to return this page with your designation.

First name	MI	Last name	Social Security number
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Section C: Designation

Please include as much information as possible. This information will assist in locating your beneficiary(ies),

Primary beneficiary #1		If surviving; otherwise, to #1 alternate beneficiary(ies).			
#1	Full name	Social Security #	Date of birth	Phone	Percentage
	<input type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Charity <input type="checkbox"/> Trust	Email or address		Relationship	
Alternate beneficiary(ies) for Primary #1 Alternate percentages must equal percentage assigned to Primary #1.					
#1a	Full name	Social Security #	Date of birth	Phone	Percentage
	<input type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Charity <input type="checkbox"/> Trust	Email or address		Relationship	
#1b	Full name	Social Security #	Date of birth	Phone	Percentage
	<input type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Charity <input type="checkbox"/> Trust	Email or address		Relationship	

Primary beneficiary #2		If surviving; otherwise, to #2 alternate beneficiary(ies).			
#2	Full name	Social Security #	Date of birth	Phone	Percentage
	<input type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Charity <input type="checkbox"/> Trust	Email or address		Relationship	
Alternate beneficiary(ies) for Primary #2 Alternate percentages must equal percentage assigned to Primary #2.					
#2a	Full name	Social Security #	Date of birth	Phone	Percentage
	<input type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Charity <input type="checkbox"/> Trust	Email or address		Relationship	
#2b	Full name	Social Security #	Date of birth	Phone	Percentage
	<input type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Charity <input type="checkbox"/> Trust	Email or address		Relationship	

- ☐ Check this box if you want PERS to apply the following: If any of the named primary beneficiaries predecease me and I have not named an alternate beneficiary, I want the portion of my benefit that was designated to that beneficiary shared equally among the remaining primary beneficiaries living at the time of my death.

Section D: Applicant statement (Signature required, electronic and digital signatures are not accepted.)

I, the applicant, hereby revoke any and all previous beneficiary designations for my AP Tier One/Tier Two award.

Print name

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

Date

Print and sign this form. This form is not valid unless signed, dated, and accepted by PERS. Invalid forms will be rejected. Mail to PERS, PO Box 23700, Tigard OR 97281-3700, or fax it to 503-598-0561.