

**Utah Retirement Systems**

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Beneficiary Designation Form

- INSTRUCTIONS:** 1. Please type or print clearly using black ink and review both sides of this form before completing.
2. This form must be completed in its entirety, signed and returned to Utah Retirement Systems (URS) for processing.
3. Please complete the *Change in Records* (MECF-1) form for marital status changes.

SECTION A » MEMBER INFORMATION

Name (First, Middle, Last)	Social Security # or Account #
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SECTION B » PLAN SELECTION**Apply this beneficiary designation to:**☐ All plans listed in this section in which I participate.

OR

☐ Only plans selected (see reverse for additional information):
☐ Active Death or Contributory Balance ☐ Retiree Option 2
☐ 401(k) Plan ☐ 457(b) Plan ☐ Roth IRA ☐ Traditional IRA

- If you wish to designate different beneficiaries for each plan, you must complete a separate form for each plan.
- If no box is checked, all plans listed in this section in which you participate will be affected by the change.
- If you wish to designate beneficiaries for Retiree and Spouse Life Insurance, please use form RTRT-4.

SECTION C » BENEFICIARY INFORMATION

Complete this section to provide information about your designated beneficiaries for the plan(s) indicated in Section B. This revokes all of your previous beneficiary designations and designates the following to receive benefits payable upon your death for the plan(s) indicated in Section B.

- You must list ALL beneficiaries you wish to designate. This will replace any beneficiary designations previously on file for the selected plan(s).
- When a percentage is not indicated, the beneficiaries' shares will be divided equally. If your percentages do not add up to 100%, each beneficiary's share will be based proportionately on the stated percentages.
- If you would like to name more than 4 primary or contingent beneficiaries, do not use this form. Instead, go to www.urs.org and log in to myURS and submit your beneficiary designation online.
- A divorce or annulment revokes your designation of a former spouse as a beneficiary. If you wish to redesignate your former spouse as beneficiary, submit a new form to URS after the date of divorce.

Primary Beneficiary(ies) Full Name	Address	Birth Date	Relationship	(Optional) % of Benefit
Contingent Beneficiary(ies) Full Name	Address	Birth Date	Relationship	(Optional) % of Benefit

Trust Information: To designate a trust as beneficiary, complete this section.

☐ Primary ☐ Contingent % of Benefit (Optional) _____

Name of Trust _____ Date of Trust _____

Name of Trustee(s) _____ Trustee(s) Address _____

SECTION D » MEMBER AUTHORIZATION

By signing below, I hereby authorize my beneficiary designations based on the information I provided on this form. This designation revokes all previous beneficiary designations for the plan(s) selected in Section B of this form. I certify that the information I have provided on this form is true, complete, and correct. Further, I certify that I am not a party to a divorce proceeding and am not subject to an injunction/order which prevents me from changing beneficiaries.

Signature	Date
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