

ACTIVE LACERA MEMBERS CHOOSING YOUR BENEFICIARIES (General & Safety)

IMPORTANT: Read this BEFORE you designate your beneficiaries

Be prepared. It is important to designate a beneficiary to receive death and/or survivor benefits in the event of your death. Having a beneficiary on file with LACERA will simplify the payment process for your survivor(s). If you do not designate a beneficiary, the choice of benefits available to your survivors may be limited, or your survivors may experience a lengthy delay in receiving payments, due to probate proceedings.

Death and/or survivor benefits will be paid according to your retirement plan provisions. For details, see your Summary Retirement Plan Description brochure. Eligibility rules for spouses, children, and domestic partners apply.*

Be sure to update your beneficiary information in response to events such as birth, death, marriage or divorce, domestic partnership registration or termination, or a change of address by your beneficiary. You may change your beneficiary designation at any time before you retire.

Plans A, B, C, D

Your beneficiary(ies) may be eligible for death and/or survivor benefits if you die before retirement.

The rights and claims of your **eligible surviving spouse, domestic partner, or minor child** to receive a monthly survivor allowance may be superior to and supersede the rights and claims of any other beneficiary.

If you do not have a spouse, domestic partner, or eligible minor child, any beneficiaries you name will be entitled to a one-time lump-sum benefit only; they will not be entitled to a monthly allowance.

Plan E

Although Plan E does not provide pre-retirement death, disability, or survivor benefits, we recommend you designate beneficiaries, especially if you have funds on deposit with LACERA.

For information on the County's Long-Term Disability and Survivor Benefits Plan and/or to name or update your beneficiaries for that plan, contact your Department's personnel office.

**Spouse must be married one year prior to member's retirement. Domestic Partner must be registered with the California Secretary of State, with a Certificate of Registered Domestic Partnership, one year prior to member's retirement. Surviving minor child(ren) are eligible for survivor allowances only when there is no surviving spouse or domestic partner. Eligible child must be unmarried, under age 18; eligibility may be extended through the age of 21 if the child(ren) remains unmarried and a full-time student in an accredited educational institution. In the event of a divorce or termination of a domestic partnership, a court order dividing the pension will supersede the designation on this form. Contact LACERA for information and a Ex-Spouse (Non-Member) beneficiary designation form.*

LACERA is governed by the County Employees Retirement Law of 1937; LACERA retirement benefits are administered in accordance with this law. In the event of a conflict between provisions of the retirement law and information presented in LACERA brochures and/or on lacera.com, the law will prevail.



BENEFICIARY INFO ONLINE

Visit lacera.com

Benefits, Beneficiaries

RETIRED LACERA MEMBERS CHOOSING YOUR BENEFICIARIES

IMPORTANT: Read this BEFORE you designate your beneficiaries

As a retiree, you probably have a beneficiary designation on file with LACERA. **It is important to keep your beneficiary information up to date.** Without a current beneficiary designation on file, the choice of benefits available to your survivors may be limited or your survivors may experience a lengthy delay in receiving payments, due to probate proceedings.

Be sure to update your beneficiary information in response to events such as birth, death, marriage or divorce, domestic partnership registration or termination, or a change of address by your beneficiary.*

Death and/or survivor benefits will be paid according to your retirement plan provisions. For details, see your Retirement Plan brochure.

Change Eligibility

If you chose Retirement Option 1, you have full flexibility to change your beneficiary after retirement. If you chose the Unmodified Option and your eligible surviving spouse or domestic partner or minor child dies before you, you may change your beneficiary designation after retirement.** You may **not** change beneficiaries if you chose any of the following Retirement Options: Unmodified+Plus, or Options 2, 3, or 4.

Spouse/Domestic Partner

The rights and claims of your eligible surviving spouse, domestic partner, or minor child to receive the survivor allowance may be superior to and supersede the rights and claims of any other named beneficiary. If you do not have a surviving spouse, the continuing allowance may be paid to your eligible surviving minor children, if any.***

\$5,000 Death/Burial Benefit (Lump Sum)

Upon your death after retirement, a \$5,000 one-time, lump-sum death/burial benefit will be paid to the primary beneficiary(ies) you name on this form, divided according to the percentages you indicate. If you would like to leave this benefit to a different beneficiary, or to designate different percentages, contact LACERA. **You may call LACERA to change your beneficiary designation for this \$5,000 Death/Burial Benefit at any time.**

**Spouse must be married one year prior to member's retirement. Domestic Partner must be registered with the California Secretary of State, with a Certificate of Registered Domestic Partnership, one year prior to member's retirement. Surviving minor child(ren) are eligible for survivor allowances only when there is no surviving spouse or domestic partner.*

***Upon your death, your beneficiary will receive any remaining balance of the retirement contributions you paid into the fund during your employment, plus credited interest. The new beneficiary is not eligible for a continuing allowance.*

****Eligible child must be unmarried, under age 18; eligibility may be extended through the age of 21 if the child(ren) remains unmarried and a full-time student in an accredited educational institution. In the event of a divorce or termination of a domestic partnership, a court order dividing the pension will supersede the designation on this form. Contact LACERA for information and a Ex-Spouse (Non-Member) beneficiary designation form.*

LACERA is governed by the County Employees Retirement Law of 1937; LACERA retirement benefits are administered in accordance with this law. In the event of a conflict between provisions of the retirement law and information presented in LACERA brochures and/or on lacera.com, the law will prevail.

NOTE: If you have a LACERA Beneficiary Designation form currently on file and are NOT changing beneficiaries, do NOT complete this form.



BENEFICIARY INFO ONLINE

Visit lacera.com

Beneficiary form on Brochures & Forms page

BENEFICIARY DESIGNATION

IMPORTANT: Read the attached Beneficiary Designation information before completing this form.

If your spouse or domestic partner is your primary beneficiary, you cannot name another primary beneficiary. If your spouse or domestic partner is **not** your primary beneficiary, you may name multiple primary beneficiaries. All members may name one or more secondary beneficiaries. Indicate the percentage share for each beneficiary in whole percentages; **do not use fractions**. The percentages for all primary beneficiaries **must total 100 percent**; the percentages for all secondary beneficiaries **must also total 100 percent**. If percentages are not specified, benefits will be divided equally.

EXAMPLES

Married with 3 children:			
Primary Beneficiary	Percent		
Spouse	100%		
Secondary Beneficiaries		Percent	
Son	34%	}	100%
Daughter	33%		
Son	33%		

Single Parent:			
Primary Beneficiaries	Percent		
Son	50%	}	100%
Daughter	50%		

Naming Primary and Secondary Beneficiaries

Note: In the event a **primary beneficiary** predeceases you, benefits will be divided equally among your remaining primary beneficiaries or, if none remain, to your **secondary beneficiary(ies)**.

MEMBER'S NAME: _____ **MEMBER'S SSN:** _____

----- Primary Beneficiary(ies) -----

Percentage*	First Name	Middle Name	Last Name
Relation to Member	Address		Apt. No.
Birth Date (MM/DD/YY)	City	State	Zip Code
Male <input type="checkbox"/> Female <input type="checkbox"/>	Social Security No.		Home Phone
Email	Cell Phone		

Percentage*	First Name	Middle Name	Last Name
Relation to Member	Address		Apt. No.
Birth Date (MM/DD/YY)	City	State	Zip Code
Male <input type="checkbox"/> Female <input type="checkbox"/>	Social Security No.		Home Phone
Email	Cell Phone		

Percentage*	First Name	Middle Name	Last Name
Relation to Member	Address		Apt. No.
Birth Date (MM/DD/YY)	City	State	Zip Code
Male <input type="checkbox"/> Female <input type="checkbox"/>	Social Security No.		Home Phone
Email	Cell Phone		

Percentage Total*

*Percentages must total 100%.



Secondary Beneficiary(ies)

Percentage*	First Name	Middle Name	Last Name
Relation to Member	Address		Apt. No.
Birth Date (MM/DD/YY)	City	State	Zip Code
Male <input type="checkbox"/> Female <input type="checkbox"/>	Social Security No.	Home Phone	
Email		Cell Phone	

Percentage*	First Name	Middle Name	Last Name
Relation to Member	Address		Apt. No.
Birth Date (MM/DD/YY)	City	State	Zip Code
Male <input type="checkbox"/> Female <input type="checkbox"/>	Social Security No.	Home Phone	
Email		Cell Phone	

Percentage Total*

*Percentages must total 100%.

Your marital status: Single Married Registered Domestic Partnership Divorced Widow(er)

Date: Marriage/Domestic Partnership

Date: Divorce/Termination of Domestic Partnership

<p>I acknowledge I have read and understand the information provided with this Beneficiary Designation form. I hereby revoke all prior designations and designate the beneficiaries named on this form.</p> <p><i>(Please print)</i></p> <p>First Name: _____ Last Name: _____</p> <p>Phone: _____</p> <p>Member Signature X _____ Date: _____</p>
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<p>Tear off and mail completed form to:</p> <p>LACERA PO Box 7060 Pasadena, CA 91109-7060</p>
