

ADAMS COUNTY BOARD OF RETIREMENT
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**ADAMS COUNTY RETIREMENT PLAN ("PLAN")
RETIRED MEMBER ADDRESS/PHONE NUMBER/NAME/BENEFICIARY CHANGE FORM**

Please read these instructions carefully and be sure you complete the appropriate parts of this form. Please **print entire form** clearly in ink.

For address/phone number changes: Complete Parts I, II and VII. You may fax this form to the above fax number. Your records will be updated.

For name changes: Complete Parts I, III, and VII. Name changes require a copy of the Court Order, Marriage Certificate, Civil Union Certificate or other documentation. You may fax this form and the required documentation to the above fax number. Your records will be updated.

For beneficiary changes: Complete Parts I, IV, VI, and VII. You must return this original form to the above address and provide a copy of your Marriage Certificate, Divorce Decree (including exhibits), or a Death Certificate. If a domestic relations order or final property division order provides that your current or former spouse or partner in a civil union is entitled to receive payments from the Plan in the event of your death, also complete Part V. If you are married and you change your primary beneficiary to someone other than your spouse or you name a cobeneficiary, your spouse must consent in writing as required in Part VIII.

Part I - Your General Information (please print entire form)

1. Name (currently on record): _____ Date of Birth: _____
2. Last 4 Digits of SSN: _____ Email: _____
3. Home/Cell:(_____)
4. Indicate all changes you are reporting: address/phone number name change beneficiary change
5. For name change, indicate reason: court order marriage civil union other
6. For a beneficiary change, indicate reason: divorce or dissolution of a civil union marriage civil union death of beneficiary other
7. Effective date of change: _____

Part II – Address/Phone Number Change

INFORMATION CURRENTLY ON RECORD	NEW INFORMATION
Address: _____	Address: _____
City/State: _____	City/State: _____
Zip Code: _____	Zip Code: _____

Part III – Name Change – Please sign using your NEW name in Part VI. Please attach a copy of the Court Order, Marriage Certificate or other documentation.

INFORMATION CURRENTLY ON RECORD	NEW INFORMATION
Last Name: _____	Last Name: _____
First Name: _____	First Name: _____
Middle or Initial: _____	Middle or Initial: _____

Part IV – Beneficiary Change

If you are married and are naming someone ***other than your spouse as sole primary beneficiary***, your spouse must consent in writing to your designation, as required in Part VIII unless your spouse is named as sole primary beneficiary for purposes of receiving the continuation benefit under the form of benefit you are currently receiving. You may change your primary or contingent beneficiary(ies) for refund of unrecovered excess contributions at any time. Please complete Part VI.

Except as noted above, because you have retired, you may change your primary or contingent beneficiary(ies) only for purposes of receiving the continuation payments under a form of benefit with a term certain feature. You may not change your beneficiary for the continuation benefit under a form of benefit with a survivor feature for purposes of receiving the survivor benefit. If (1) you elected a 10-year Certain and Life Annuity, (2) you elected a Joint and Survivor Annuity with “Pop Up”, and your beneficiary has died within the term certain period, or (3) you elected a single life annuity (for refund of unrecovered excess contributions) you may change your primary or contingent beneficiary(ies) for purposes of receiving the continuation benefit for the remaining term certain period.

If you name a minor child (under age 18) as beneficiary, complete the box at the end of this Part IV for Custodian under the Uniform Transfers to Minors Act. A benefit CANNOT be paid directly to a child under age 18, but must be paid to a court appointed conservator or a Custodian for the child’s benefit until age 21. If your beneficiary is under age 21, but at least 18, the benefit may be paid to the beneficiary if no conservator or Custodian is named but you may still name a Custodian if you prefer that to an outright distribution. The Custodian is required to transfer funds under the Custodian’s control to the child when the child turns 21. If, by the time for distribution, the beneficiary reaches age 18 (or 21, if you indicate that you want a Custodian to that age), the distribution will be made to the beneficiary rather than the Custodian.

If you have a will that creates a trust, and you want that trust to be the beneficiary, enter “Trust under Will” in the box for the “First Name” for the Primary Beneficiary in this Part IV. If your will creates more than one trust, identify the trust to which the benefit should be paid.

If you have created a trust during your lifetime (not under your will), and you want the trust to be the beneficiary, enter the name of the trust in the box for the “First Name” for the Primary Beneficiary in this Part IV. Enter the name of the current trustee in the box for “Last Name”. Enter the current trustee’s mailing address, and then enter the date the trust was created under “Date of Birth”. If the Trust has a tax identification number, enter it in the box for “Social Security Number”.

If you name your estate as beneficiary, the personal representative, an administrator or an executor must be appointed before the benefit can be paid. If you choose to name your estate enter “My Estate” in the box for the “First Name” for the Primary Beneficiary in this Part IV.

The amount of any death benefit assigned to a current or former spouse or partner in a civil union, as cobeneficiary(ies), which you provide in Part V, will be deducted from the amount available to the beneficiary(ies) you designate below, provided that if you are or subsequently become married, your spouse consents to such designation(s).

Types of Beneficiaries

- A. **Primary Beneficiary** – Person(s) to receive the death benefit payable upon the death of the member.
- B. **Contingent Beneficiary** – Person(s) to receive the death benefit payable upon the death of the member *if the primary beneficiary(ies) dies before the member.*

If you name **multiple** primary (or contingent) beneficiaries, the proceeds will be split equally among your primary beneficiaries who survive you or, if none of your primary beneficiaries survive you, equally among your contingent beneficiaries who survive you, unless you instruct a different percentage split on this form.

If your **primary** beneficiary(ies) dies before you, and you have not named a contingent beneficiary, the proceeds will be paid to your estate.

If you elected a form of benefit that provides a **term certain benefit after your death** and the term certain payments have not been completed at your death, the “actuarial equivalent” value of the remaining monthly payments will be paid to your estate if no beneficiary is living at your death. If one or more beneficiaries survive you, the remaining monthly payments will be made to such beneficiaries after your death. If the term certain payments have not been completed at the death of your last surviving beneficiary, the “actuarial equivalent” value of the remaining monthly payments will be paid in a lump-sum to the estate of your last surviving beneficiary.

Beneficiary Designation: If your Beneficiary is under age 18 or if you want a custodian for a child age 18-21, complete the Beneficiary Information and the Custodian Information below.

Primary Beneficiary Information				
First Name		M.I.	Last Name	
Mailing Address				
Street/P.O. Box/Route		City	State	Zip Code
Date of Birth	Social Security Number		Male <input type="checkbox"/>	Female <input type="checkbox"/>
Relationship to member <input type="checkbox"/> Spouse <input type="checkbox"/> Partner in a Civil Union <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Other:				
First Name		M.I.	Last Name	
Mailing Address				
Street/P.O. Box/Route		City	State	Zip Code
Date of Birth	Social Security Number		Male <input type="checkbox"/>	Female <input type="checkbox"/>
Relationship to member <input type="checkbox"/> Spouse <input type="checkbox"/> Partner in a Civil Union <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Other:				
First Name		M.I.	Last Name	
Mailing Address				
Street/P.O. Box/Route		City	State	Zip Code
Date of Birth	Social Security Number		Male <input type="checkbox"/>	Female <input type="checkbox"/>
Relationship to member <input type="checkbox"/> Spouse <input type="checkbox"/> Partner in a Civil Union <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Other:				

Contingent Beneficiary Information				
First Name		M.I.	Last Name	
Mailing Address				
Street/P.O. Box/Route		City	State	Zip Code
Date of Birth	Social Security Number		Male <input type="checkbox"/>	Female <input type="checkbox"/>
Relationship to member <input type="checkbox"/> Spouse <input type="checkbox"/> Partner in a Civil Union <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Other:				
First Name		M.I.	Last Name	
Mailing Address				
Street/P.O. Box/Route		City	State	Zip Code
Date of Birth	Social Security Number		Male <input type="checkbox"/>	Female <input type="checkbox"/>
Relationship to member <input type="checkbox"/> Spouse <input type="checkbox"/> Partner in a Civil Union <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Other:				
First Name		M.I.	Last Name	
Mailing Address				
Street/P.O. Box/Route		City	State	Zip Code
Date of Birth	Social Security Number		Male <input type="checkbox"/>	Female <input type="checkbox"/>
Relationship to member <input type="checkbox"/> Spouse <input type="checkbox"/> Partner in a Civil Union <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Other:				

Custodian Information for Beneficiary currently under age 18 or, if desired, under age 21.

First Name	M.I.	Last Name		
Mailing Address				
Street/P.O. Box/Route		City	State	Zip Code
Relationship to member <input type="checkbox"/> Spouse <input type="checkbox"/> Partner in a Civil Union <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Other:				
<input type="checkbox"/> Pay the Beneficiary directly if at least age 21 when the Plan distributes the benefit		<input type="checkbox"/> Pay the Beneficiary directly if at least age 18 when the Plan distributes the benefit		

Part V – Cobeneficiary Information

The following person has been designated to receive a portion of my benefit from the Plan as a cobeneficiary entitled to payments after my death if I die before I retire and that if I am, or subsequently become married, my spouse must consent in writing to the cobeneficiary indicated below, as required in Part VIII. (Copies of all DROs and final property division orders must be attached to this form.)

First Name	M.I.	Last Name		
Mailing Address				
Street/P.O. Box/Route		City	State	Zip Code
Date of Birth	Social Security Number			Male <input type="checkbox"/> Female <input type="checkbox"/>
				% or \$ Amount

Part VI – Contingent Beneficiary Designation for Excess Contributions (all members should complete). If your Beneficiary is under age 18 or if you want a custodian for a child age 18-21, complete the Beneficiary Information and the Custodian Information below.

If the sum of the monthly benefits my beneficiary(ies), cobeneficiary, if any, alternate payee, if any, and I receive is less than the value of my contribution accumulation plus the value of the payments I made for the purchase of service credit, if any, I hereby designate the following person(s) to receive the difference (note: the beneficiary(ies) designated below should be someone other than the beneficiary(ies) designated in Part IV).

First Name	M.I.	Last Name		
Mailing Address (if different from Plan member)				
Street/P.O. Box/Route		City	State	Zip Code
Date of Birth	Social Security Number			Male <input type="checkbox"/> Female <input type="checkbox"/>
Relationship to member <input type="checkbox"/> Spouse <input type="checkbox"/> Partner in a Civil Union <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Other:				
Benefit %				

First Name	M.I.	Last Name		
Mailing Address (if different from Plan member)				
Street/P.O. Box/Route		City	State	Zip Code
Date of Birth	Social Security Number			Male <input type="checkbox"/> Female <input type="checkbox"/>
Relationship to member <input type="checkbox"/> Spouse <input type="checkbox"/> Partner in a Civil Union <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Other:				
Benefit %				

First Name	M.I.	Last Name		
Mailing Address (if different from Plan member)				
Street/P.O. Box/Route		City	State	Zip Code
Date of Birth	Social Security Number			Male <input type="checkbox"/> Female <input type="checkbox"/>
Relationship to member <input type="checkbox"/> Spouse <input type="checkbox"/> Partner in a Civil Union <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Other:				
Benefit %				

Custodian Information for Beneficiaries currently under age 18 or, if desired, under age 21.

First Name		M.I.	Last Name	
Mailing Address				
Street/P.O. Box/Route		City	State	Zip Code
Relationship to member	<input type="checkbox"/> Spouse	<input type="checkbox"/> Partner in a Civil Union	<input type="checkbox"/> Child	<input type="checkbox"/> Parent <input type="checkbox"/> Other:

Part VII - Affirmation

I declare and affirm that the statements above are true, complete, and correct. I authorize and direct the Plan Executive Director to act in accordance with my instructions as indicated above. I agree to release, discharge and indemnify the Plan, Retirement Board, Adams County, and the Rangeview Library District, including, as applicable, these entities' officers, members, employees, trustees, fiduciaries, consultants, affiliates and agents from all liability and claims, including related costs and attorneys' fees, for acting pursuant to this affirmation.

Signed: _____ Date: _____
 Signature of Member

Part VIII - Spousal Consent and Acknowledgement

I, the undersigned, as the spouse of the Adams County Retirement Plan member, hereby voluntarily consent to the beneficiary(ies) indicated above in Part IV, and any cobeneficiary designation indicated in Part V above. I acknowledge that I understand that the effect of my consent may be to forfeit benefits that I would have been entitled to receive upon my spouse's death, and after benefits have begun, my consent is irrevocable. I agree to release and indemnify the Plan, Retirement Board, and my spouse's employer (Adams County or the Rangeview Library District), including, as applicable, these entities' officers, members, employees, trustees, fiduciaries, consultants, affiliates and agents from all liability and claims, including related costs and attorneys' fees, for acting pursuant to this consent.

Signed: _____ Date: _____
 Signature of Spouse

Witness: _____ Date: _____
 Adams County Retirement Plan Representative

If you do not sign the spousal consent and acknowledgement portion of this form before an Adams County Retirement Plan representative, you must sign the form before a notary public.

The foregoing Spousal Consent and Acknowledgement was acknowledged before me this _____ day of _____, 20____, by _____.	
_____ (Notary's official signature)	Notary Seal
_____ (Commission Expiration)	