

## **Judge Member Service: Pre-Retirement Designation of Beneficiary Packet**

**Important: Read instructions before you complete and submit the enclosed form.**

**It is important that you file a Designation of Beneficiary form with PERS for each program in which you are a member.** If you die before retirement and there is no designation of beneficiary on file, distribution will be made in accordance with statute. Forms for all programs can be found on the PERS website at <http://oregon.gov/pers>.

### **Surviving spouse pension**

The surviving spouse of a judge member is the automatic recipient of a surviving spouse pension under ORS 238.565 unless a prenuptial or antenuptial agreement stating otherwise has been filed with PERS. You may elect to have a former spouse receive all or a portion of the pension payable to a surviving spouse. See ORS 238.565(8). To make this election, you must also complete a Judge Member Election of Former Spouse as a Pension Recipient form.

### **Beneficiary designation**

If you do not have a spouse, or you have provided a prenuptial or antenuptial agreement with PERS, or your spouse predeceases you, the beneficiary named here will receive a lump-sum payment of any remaining balance of your judge member account at the time of your death.

You have the following options when naming a beneficiary. You can name:

1. any person,
2. the personal representative of your estate, or
3. a trustee of the trust you designate.

If you name a person as your beneficiary and they predecease you, any remaining member account balance will be paid to your estate.

### **General instructions**

- Type or print clearly in dark ink. Illegible forms may be returned, which could delay your request.
- Do not change anything on the form; alterations will void the form.
- Sign and date the statement at the bottom of the form, and mail or fax the form to PERS.

### **Section A: Member information**

Fill in the personal information block completely.

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.

If you do not know your PERS number, leave it blank.

### **Section B: Spouse information**

Provide information on your current spouse in the space provided.

If you are electing to have a former spouse receive all or a portion of the pension payable, check the box in Section B. You must also complete a Judge Member Election of Former Spouse as a Pension Recipient.

**Beneficiary designation**

Complete Section C to designate a person as beneficiary.

Complete Section D to designate your estate as beneficiary.

Complete Section E to designate a trust as beneficiary.

**Section C: Specific person beneficiary designation**

We have provided an example of Section C to help you correctly fill out this portion of your application.

Complete this section if you are naming a specific person as beneficiary. Include the beneficiary's name, his or her relationship to you (optional\*), and his or her date of birth (optional\*).

Example (sample of information a member would enter is in bold italics):

<b>Specific beneficiary</b>	<b>Date of birth (optional)*</b>	<b>Relationship (optional)*</b>
#1) Beneficiary name <i><b>Mary Ann Jenkins</b></i>	(mm/dd/yyyy) <i><b>06/01/1957</b></i>	<i><b>Sister</b></i>

\*This information helps PERS locate the people you designate.

**Section D: Estate designation**

Check the box to indicate you want to designate your estate as the beneficiary. Enter the name of the personal representative and the address in the space provided.

**Section E: Trust designation**

Check the box to indicate you want to designate your trust as the beneficiary. Enter the legal name of the trust, the name of the trustee, the address, and the date the trust was established in the space provided.

**Section F - Member signature (required)**

Your signature is required. Be sure to sign and date where indicated.



# Judge Member Service: Pre-Retirement Beneficiary Designation

This form is strictly for judge members. Call PERS or visit our website if this is not the form you need.

## Section A: Member information (Type or print clearly in dark ink. Illegible forms could be returned to you. Which could delay your request.)

First name	MI	Last name	Social Security number*
Mailing address (street or PO box)		PERS number (optional)	
City	State	Zip	Country
			Day phone number

## Section B: Spouse information

First name	MI	Last name	Social Security number
Mailing address (street or PO box)		Date of birth (mm/dd/yyyy)	
City	State	Zip	

I am also electing to have all or a portion of my surviving spouse's pension paid to a former spouse.  
 (You must complete a Judge Member Election of Former Spouse as Pension Recipient form.)

### Beneficiary designation

Complete Section C to designate a person as beneficiary.  
 Complete Section D to designate your estate as beneficiary.  
 Complete Section E to designate a trust as your beneficiary.

## Section C: Specific person beneficiary designation

I designate a specific person as my beneficiary.

Specific person beneficiary	Date of birth (optional)*	Relationship (optional)*
Beneficiary name	(mm/dd/yyyy)	

## Section D: Estate designation

I designate my estate as my beneficiary.

Name of personal representative: \_\_\_\_\_  
 Address: \_\_\_\_\_

## Section E: Trust designation

I designate my trust as my beneficiary.

Legal name of trust (e.g., The Sara Smith Living Trust): \_\_\_\_\_  
 Name of trustee: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Date trust established: \_\_\_\_\_

## Section F - Member signature (required)

I revoke all previous judge member beneficiary designations.

\_\_\_\_\_  
 Applicant signature (do not print) Date

Office use only	
<input checked="" type="checkbox"/> PERS	<input type="checkbox"/> OPSRP <input type="checkbox"/> IAP
<input type="checkbox"/> Member	<input type="checkbox"/> Alternate payee
<input type="checkbox"/> Cross reference member SSN	

\*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 503-598-7377, toll free 888-320-7377, or TTY 503-603-7766.