

# Introduction

## Beneficiary Selection Form

### (If Member Dies Before Retirement)

Form Last Revised: October, 2016

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The *Beneficiary Selection Form* allows a member to select an eligible beneficiary to receive an allowance if the member dies before retirement and to select a beneficiary(ies) to receive payment of accumulated deductions and other payments due to a member if the member dies before retirement. Keep in mind:

- Only certain of your relatives qualify as an eligible beneficiary for benefits under G.L. c. 32, § 12(2)(d), but any person or entity can be selected as a beneficiary(ies) for a return of your accumulated total deductions.
- Your selection on this form may be superseded by an eligible spouse under the provisions of G.L. c. 32, § 12(2)(d) if you die before retirement.
- This form becomes void upon your retirement.
- If you divorce or your personal situation changes, you may wish to file a new form with your retirement board.



# Beneficiary Selection Form (If Member Dies Before Retirement)

Form Last Revised: October, 2016

**Retirement Board:** Please place your address and phone number here. ▶

## Choice of Beneficiary to Receive a Return of Accumulated Total Deductions at Member's Death

I, (Print Name) \_\_\_\_\_, a member of the Berkshire County Retirement System hereby request the Board of Retirement to pay any sum referred to in G.L. c. 32, § 11(2)\* due at my death to the following beneficiary or beneficiaries in the proportions designated.

My selection may be superseded by a selection under G.L. c. 32, § 12(2)(d) if I die leaving an eligible spouse who elects to receive a monthly benefit.

I understand that I may change my beneficiary designation at any time prior to my retirement and that upon my retirement, this form becomes void.

\*The types of payments covered under G.L. c. 32, § 11(2) include:

- The payment of the accumulated deductions credited to a member's account in the annuity savings fund at the date of death when the member's death occurs prior to his/her retirement.
- The amount of any uncashed checks payable to a member at his or her death.
- Any person or entity may be a beneficiary under G.L. c. 32, § 11(2). Give complete name and address of each beneficiary below:

Name \_\_\_\_\_ SSN \_\_\_\_\_ Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_ Proportion To Be Paid \_\_\_\_\_

Name \_\_\_\_\_ SSN \_\_\_\_\_ Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_ Proportion To Be Paid \_\_\_\_\_

Name \_\_\_\_\_ SSN \_\_\_\_\_ Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_ Proportion To Be Paid \_\_\_\_\_

Name \_\_\_\_\_ SSN \_\_\_\_\_ Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_ Proportion To Be Paid \_\_\_\_\_

Member's Signature \_\_\_\_\_ Date \_\_\_\_\_

Member's Address \_\_\_\_\_

Witness' Signature \_\_\_\_\_ Date \_\_\_\_\_

Witness' Name (Print) \_\_\_\_\_



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Member's Last Name \_\_\_\_\_ First \_\_\_\_\_ M.I. \_\_\_\_\_ Social Security # \_\_\_\_\_

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**Option D provides a designated beneficiary with an allowance for life. Members may designate only one Option D beneficiary. If someone is designated as an Option D beneficiary, they must take the allowance. No disbursement of the member's accumulated total deductions may be made if a beneficiary is nominated under Section 12(2)(d).**

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### Choice of Option (D) Beneficiary

I, (Print Name) \_\_\_\_\_, a member of the Berkshire County Retirement System, hereby nominate the beneficiary \* listed below, under the provisions of G.L. c. 32, § 12(2)(d) to receive from the retirement system a benefit equal to the Option (C) retirement allowance which would otherwise have been payable to me in the event that I die before being retired.

I understand that I may change my beneficiary designation at any time prior to my retirement and that upon my retirement this form becomes void.

I understand that this choice of Option D Beneficiary can be superceded if, at my death, I leave a spouse to whom I have been married for over one year and with whom I am living on the date of my death, or if living apart, for justifiable cause as determined by the Retirement Board.

### Beneficiary

Name of Eligible Beneficiary \_\_\_\_\_ Beneficiary's Relationship to Member \_\_\_\_\_

Beneficiary's Date of Birth (*Attach birth record*) \_\_\_\_\_ Beneficiary's Social Security # \_\_\_\_\_

### Member

Member's Signature \_\_\_\_\_ Date \_\_\_\_\_

Member's Street Address \_\_\_\_\_ Member's Social Security # \_\_\_\_\_

City/Town \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### To Be Completed by Witness of Choice of Option D Beneficiary

Witness' Signature \_\_\_\_\_ Date \_\_\_\_\_

Witness' Name (Print) \_\_\_\_\_

\* An eligible beneficiary is defined under G.L. c. 32, § 12(2)(d) as the spouse, former spouse who has not remarried, child, father, mother, sister or brother of the member.