



BENEFICIARY DESIGNATION

PERSONAL DATA

Name (Please Print)

Social Security Number/Account Number

Home Address

Date of Birth

City

State

Zip

Home Telephone Number

Employer

Work Telephone Number

BENEFICIARY INFORMATION

This Beneficiary Designation will be valid only if:

- **It is signed and dated.**
- **Each beneficiary is clearly named, the relationship to the participant, and dates of birth are provided, and the benefit percentages total 100%.**
- **It is also suggested that Social Security numbers are provided to facilitate identification.**

- A primary beneficiary is the person or persons who are your first choice to receive your Plan benefits in the event of your death. Should a primary beneficiary pre-decease you, your Plan assets will be divided among the remaining primary beneficiaries, if any.
- A contingent beneficiary is the person or persons who would receive your Plan benefits if your primary beneficiary (or all your primary beneficiaries, if more than one) predecease you.
- A person may not be listed as both a primary and a contingent beneficiary.
- A surviving spouse who is a Plan participant because he or she is a beneficiary of a deceased participant may designate a beneficiary. If your participation in the Plan is solely because you are a beneficiary of a deceased participant or if your account was established as a result of a Qualified Domestic Relations Order, you may not designate a beneficiary.
- Please attach a separate sheet, if you need to list additional beneficiaries.
- The Estate Powers and Trust Law (EPTL) §5.14 requires that if the participant wishes to keep the former spouse as the beneficiary after a divorce, annulment, or judicial separation, the participant must re-designate the former spouse as a beneficiary by submitting a new form to the Plan after the date of the divorce, annulment, or judicial separation.
- If you select "Equal Percentage" for your beneficiaries, there may be some minor variance based upon the number of beneficiaries you have listed. For example: if you list three beneficiaries, the oldest beneficiary will be designated 33.34% and the other two will be 33.33%.

Primary Beneficiary(ies) *(must be in whole percentages and total 100%)*

Equal percentages for each primary beneficiary

Beneficiary Name	Relationship	Date of Birth	Social Security Number	_____% Percent
Beneficiary Address			Phone Number	
Beneficiary Name	Relationship	Date of Birth	Social Security Number	_____% Percent
Beneficiary Address			Phone Number	
Beneficiary Name	Relationship	Date of Birth	Social Security Number	_____% Percent
Beneficiary Address			Phone Number	
				Total = <u>100%</u>

Contingent Beneficiary(ies) *(must be in whole percentages and total 100%)*

Equal percentages for each contingent beneficiary

Beneficiary Name	Relationship	Date of Birth	Social Security Number	_____% Percent
Beneficiary Address			Phone Number	
Beneficiary Name	Relationship	Date of Birth	Social Security Number	_____% Percent
Beneficiary Address			Phone Number	
Beneficiary Name	Relationship	Date of Birth	Social Security Number	_____% Percent
Beneficiary Address			Phone Number	
				Total = <u>100%</u>

AUTHORIZATION

The execution of this form and acceptance by the NYSDCP revokes all prior designations that I have made. I understand that if percentages are not provided or if the box designating equal percentages is not marked, your Plan assets will be divided equally among your named beneficiaries or contingent beneficiaries, as provided on the front of this form.

Participant Signature _____

Date _____

Return to: New York State Deferred Compensation Plan
Administrative Service Agency
P.O. Box 182797
Columbus, OH 43218-2797

Overnight Address: New York State Deferred Compensation Plan
Administrative Service Agency, DSPF-F2
3400 Southpark Place, Suite A
Grove City, OH 43123-4856

