

TYPE OR USE INK

THE DIOCESE OF SANTA ROSA  
LAY EMPLOYEES' PENSION PLAN  
BENEFICIARY DESIGNATION

A copy of this  
designation will be  
returned to you.

Name \_\_\_\_\_ Social Security No. \_\_\_\_\_

Address \_\_\_\_\_

Phone No. \_\_\_\_\_

Please check one:  Married  Single

**IMPORTANT NOTICE**

If you are **legally married**, your primary beneficiary is automatically your spouse. Neither you nor your spouse may elect otherwise.

If **you are not married**, your primary beneficiary is any person that you designate to receive death benefits under the plan, if any are payable.

Regardless of your marital status, it is important to designate a beneficiary — and to keep your designation up-to-date. If you fail to designate a beneficiary — or your beneficiary is not living at the time of your death — then the benefits due will be paid in accordance with the plan and the plan's administrative procedures.

Should your spouse or other beneficiary fail to survive you by at least 30 days — or if you and your beneficiary die in a common accident or disaster — you will have been deemed to have died last.

This designation supersedes and replaces all previous designations under this Plan, provided it has been dated and initialed by the Plan Administrator's authorized delegate, before your date of death.

Beneficiary designation. See opposite side for sample designations. Attach a separate page if more space is necessary.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Beneficiary Address \_\_\_\_\_

\_\_\_\_\_

**Use separate page if more than one address and indicate name of each addressee.**

**EMPLOYEE SIGNATURE**

I hereby make the above designation, revoking and replacing all previous designations under this plan. I understand if I am legally married at my death, my spouse has priority over any other claim presented.

Signature of Employee \_\_\_\_\_ Date \_\_\_\_\_

**PLAN ADMINISTRATOR'S RECORD OF RECEIPT**

Date Received: \_\_\_\_\_ Initials: \_\_\_\_\_

## INSTRUCTIONS

1. Use this form to designate or change your primary and/or secondary beneficiary.
2. Where more than one primary and/or secondary beneficiary is designated, the amount to be paid to each beneficiary must be clearly set forth by designating fractions or portions to be received.
3. Your secondary beneficiary will receive a benefit only if (a) your primary beneficiary dies before you, or (b) your primary beneficiary dies before receiving the total survivor benefit.
4. If your death occurs and a minor is designated, or your beneficiary is incapable of giving valid receipt, the Plan Administrator may direct that payment be made to the person or institution responsible for the care and maintenance of such individual.
5. The proper wording for typical nominations of beneficiary is shown below. In the event none of the following nominations provide the disposition desired, you should consult your attorney.

Designations in bold type mean your spouse is your primary beneficiary

Type of Beneficiary	Language To Be Used
1. Estate	Estate
2. One Primary Beneficiary	Peter Jones, father.
3. Two Primary Beneficiaries	Peter Jones, father and Anna Jones, mother, equally, or the survivor.
4. Three or More Primary Beneficiaries	Peter Jones, father, Anna Jones, mother, and Mary Jones, daughter, or the survivors, equally or the survivor.
5. <b>One Primary Beneficiary and One Secondary Beneficiary</b>	<b>Dorothy Q. Jones, spouse, if living, otherwise Mary Jones, daughter.</b>
6. <b>One Primary Beneficiary and Two Secondary Beneficiaries</b>	<b>Dorothy Q. Jones, spouse, if living, otherwise Mary Jones, daughter, Quincy Jones, son, equally, or the survivor.</b>
7. <b>One Primary Beneficiary and Three or more Secondary Beneficiaries</b>	<b>Dorothy Q. Jones, spouse, if living, otherwise Mary Jones, Quincy Jones, and Edna Jones, children, or the survivor, or survivors, equally.</b>
8. <b>One Primary Beneficiary and Unnamed Children as Secondary Beneficiaries</b>	<b>Dorothy Q. Jones, spouse, if living, otherwise the children born of the marriage of the designator and said wife, or the survivor, or the survivors, equally.</b>
9. Two Primary Beneficiaries and One Secondary Beneficiary	Peter Jones, father, and Anna Jones, mother, equally, or the survivor, if either survives; otherwise Mary Jones, daughter.
10. Two Primary Beneficiaries in Unequal Shares	Peter Jones, father, as to three-fourths (3/4) and Anna Jones, mother, as to one-fourth (1/4), or the survivor.
11. Trustee or Business Partner	_____ (trustee or business partner) under a (trust agreement or partnership agreement) dated _____.
12. Revocable Inter Vivos Trust	Surviving Trustee(s) under the Trust Agreement Establishing the [Name of trust, such as "Peter and Dorothy Jones Revocable Trust"] dated [date trust agreement signed].

Designations in bold type mean your spouse is your primary beneficiary

THE PLAN ADMINISTRATOR'S RETURN ADDRESS
Retirement Plan Administrator The Diocese of Santa Rosa Lay Employees' Pension Plan P.O. Box 1297 Santa Rosa, California 95402 (707) 545-7610