

# Retirement System Change Request

Employee's Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Initial \_\_\_\_\_

Employee's Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Employee's Social Security Number (Last 4 Digits) \_\_\_\_\_ EIN \_\_\_\_\_ Contact Phone Number \_\_\_\_\_

**Marital Status:**

Single       Married  
 Widowed    Divorced

Name of current spouse \_\_\_\_\_

Spouse's birth date \_\_\_\_\_

I am changing my Primary Beneficiary designation(s) to: \_\_\_\_\_

Primary Beneficiary Name(s)	Address	Relationship	DOB	SSN	%
<i>(If you have a spouse, you may want your spouse to be your sole primary beneficiary - see notes below.)</i>					

I am changing my Contingent Beneficiary designation(s) to: \_\_\_\_\_

Contingent Beneficiary Name(s)	Address	Relationship	DOB	SSN	%
<i>(Contingent Beneficiary is/are the payee(s) who will be paid if primary beneficiary is already deceased.)</i>					

A member may designate as many beneficiaries as he/she chooses. Make sure the information is clearly stated with regards to percentages for each beneficiary.

Filing this form will replace prior filings.

Please make a copy for your records and return this original form to the address listed below

\_\_\_\_\_  
Signature of Member

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

## Retirement System Beneficiary Designation

In the event of your death, having your beneficiary information on file with the Retirement Systems will make handling your affairs easier for your survivors. Information can be changed at any time but it **must be changed by using this form**. You may designate as many beneficiaries as you choose.

### Employees' and Uniformed Retirement System members, who are vested:

In the event of the member's death prior to retirement, if the member has a current spouse AND that spouse is listed as the member's sole Primary Beneficiary, that designated spouse will have the option of requesting a 50% survivor benefit, payable to him/her for their lifetime, OR a refund of the member's contributions and interest. If a member lists a spouse AND anyone else as their Primary Beneficiaries, the distribution of their account balance will be according to the percentages listed, and no spousal benefit will be applicable. Refunds are paid out of the retirement system within 60-90 days after receipt of a member's death certificate. For more information, please visit the Retirement Systems website at <http://www.fairfaxcounty.gov/retirement/>.

### Police Officers Retirement System (PORS):

In the event of the death of a Police Officer, the surviving spouse (if there is one) and dependent children are entitled to an Automatic Benefit payment. For more information on survivor benefits in the Police Officers Retirement System, please visit the Retirement Systems website at <http://www.fairfaxcounty.gov/retirement/>. Refunds are paid out of the PORS within 60-90 days after receipt of a member's death certificate. PORS beneficiaries do not receive interest on the member's contribution balance.