

Retirement Plan F/Beneficiary Designation

Last Name:		First Name:		Middle Initial:
Address:		City:	State:	Zip:
Social Security #:		Phone #:	<input type="checkbox"/> Male <input type="checkbox"/> Female	Date of Birth:
<input type="checkbox"/> Single <input type="checkbox"/> Married	<input type="checkbox"/> Divorced <input type="checkbox"/> Widowed	<input type="checkbox"/> New Hire <input type="checkbox"/> Rehired**	Start Date:	

***Rehired employees who left their money in the Fairfax County Uniformed System (URS) must return to participation in the Plan they contributed to during their previous period of County employment. Any member returning to URS, who **previously removed** their contribution balance from the system, will be considered a new member of URS and be enrolled into the current Plan. Any eligible purchase of prior service must be started no later than one year after rehire date to qualify for lower interest. For additional information visit: www.fairfaxcounty.gov/retirement.*

Beneficiary Designation: If you are a vested employee on the active payroll when you die, and your spouse is listed as your **sole primary beneficiary**, your spouse will have the option of requesting a 50% survivor benefit, payable to them for their lifetime, or a refund of contributions and interest. Refunds are paid out of the retirement system within 60-90 days after receipt of a member's death certificate. For more information, visit the Retirement Systems website - www.fairfaxcounty.gov/retirement/tips/a050-beneficiary-information-tip-sheet.

Alternate Beneficiary is/are the payee(s) who will be paid if Primary Beneficiary is already deceased.

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.

Check this box if you have provided any additional beneficiary names or information

<input type="checkbox"/> Primary*	Name:	%
Relationship:	SSN:	DOB:
Address if different from above:		
<input type="checkbox"/> Primary	Name:	%
Relationship:	SSN:	DOB:
Address if different from above:		

*You may designate more than one primary beneficiary.

<input type="checkbox"/> Alternate	Name:	%
Relationship:	SSN:	DOB:
Address if different from above:		
<input type="checkbox"/> Alternate	Name:	%
Relationship:	SSN:	DOB:
Address if different from above:		
<input type="checkbox"/> Alternate	Name:	%
Relationship:	SSN:	DOB:
Address if different from above:		

I have read and understand that **only my spouse** will have the option of requesting a 50% survivor benefit if my spouse is named my **sole primary beneficiary**.

Member Signature: _____ **Date:** _____

Is your Beneficiary Information Current?

Retirement System Beneficiary and Demographic Changes for members in the Employees' and Uniformed Retirement Systems.

To make changes to your beneficiary or other demographic information, please submit a Retirement System Change Request form to the Retirement Systems office. Completed forms can be faxed to 703-653-9543 or mailed.



When designating a Beneficiary:

If you are NOT married at the time of your death, or have not designated your spouse as your sole primary beneficiary, your beneficiary(ies) is/are entitled to a refund of all your contributions, including any applicable interest. Refunds are paid from the system within 60-90 days after receipt of your death certificate.

If you ARE married, and still on the active employee payroll when you die, and your spouse is listed as your **sole primary beneficiary**, your spouse will have the option of receiving a 50% survivor benefit, payable to them for their lifetime. If designated as such, a 50% survivor benefit would be payable to your spouse as long as you were **vested** at the time of your death. If you are not yet vested or if your spouse chooses to simply request a distribution of your entire account balance instead, that will be their choice.

If your death occurs AFTER your retirement, and you have NOT chosen a Joint and Last Survivor benefit for your spouse, any balance in your account that has not been paid to you in retirement benefits, will be refunded to your beneficiary, within 60-90 days after receipt of your death certificate.

Retirement benefits are paid out of your contributions to the Retirement System first. In the event of your death after retirement, if you have not chosen a Survivor benefit, the amount of your accumulated contributions and interest, (reduced by any retirement benefits previously received by you) will be paid by lump sum to your beneficiary(ies).



REMEMBER: A retired member's contribution balance including interest is typically depleted within 1½ - 3 years after retirement so it is possible that there will not be an amount payable to your beneficiary, depending on how many years you have been retired prior to your death.