



Orange County Employees Retirement System  
2223 E. Wellington Avenue, Suite 100  
Santa Ana, CA 92701  
(714) 558-6200  
[www.ocers.org](http://www.ocers.org)

# Beneficiary Change Form

## Instructions for Changing your Beneficiary

1. You may name one person or any number of persons as your primary or alternate beneficiary.
  - a. **Primary Beneficiary:** A primary beneficiary is the person or persons who would receive a benefit from OCERS upon your death.
  - b. **Alternate Beneficiary:** An alternate beneficiary is the person or persons who would receive a benefit from OCERS if you have no living primary beneficiaries on the date of your death.
  - c. If you name more than one person in either category, you must indicate what percentage of the benefit each individual is to receive. The total percentage for each category must be 100%. If you do not indicate a percentage, the benefit will be divided into equal parts.
  - d. If you have more than four beneficiaries, please write the requested information on a separate sheet of paper and attach it to this form. If you use a second sheet, it must also contain your signature. Please use the same format as the original form.

**Note:** Your designated beneficiary will remain valid until you file another Beneficiary Change Form.



# Beneficiary Change Form

Please print or type

## 1. Member Information

First Name	M.I.	Last Name	Social Security Number
Home/Mailing Address		Home Phone Number	Work Phone Number
Department / Employer		Marital Status    S <input type="checkbox"/> M <input type="checkbox"/> W <input type="checkbox"/> If married date of marriage: _____	

Status -    Active     Retired     Deferred

## 2. Beneficiary Information

### Beneficiary(ies):

#### Primary 1

Beneficiary Name	Relationship	% of Benefit
Date of Birth	Social Security Number	
Home/Mailing Address	Daytime Phone Number	
City	State	Zip Code

### Beneficiary(ies):

#### Primary 2

Beneficiary Name	Relationship	% of Benefit
Date of Birth	Social Security Number	
Home/Mailing Address	Daytime Phone Number	
City	State	Zip Code

### Beneficiary(ies):

#### Alternate 1

Beneficiary Name	Relationship	% of Benefit
Date of Birth	Social Security Number	
Home/Mailing Address	Daytime Phone Number	
City	State	Zip Code

### Beneficiary(ies):

#### Alternate 2

Beneficiary Name	Relationship	% of Benefit
Date of Birth	Social Security Number	
Home/Mailing Address	Daytime Phone Number	
City	State	Zip Code

## 3. Member Certification

I hereby designate the person(s) entered in Section 2 of this form as beneficiary to my retirement account. I understand that this election revokes any previous beneficiary designations.

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

Date \_\_\_\_\_

### For OCERS Office Use Only

Date beneficiary changed: \_\_\_\_\_

Processed by: \_\_\_\_\_