

DESIGNATION OF BENEFICIARIES FORM

Use this form to designate the beneficiaries of your SAG-Producers Pension Plan (Plan) benefits in the event of your death. You may choose anyone to be your beneficiary, and you may change your designation(s) at any time prior to commencing your benefit, unless you initiated your pension benefits and elected either the Five- or Ten-Year Certain payment option. This is a confidential legal document, which the participant or legal guardian of the participant must sign. Completed forms can be sent to pensionhelp@sagafraplans.org.

SECTION I: PERSONAL INFORMATION

Social Security No. _____ Date of Birth _____

Last Name _____ First Name _____ Middle Name _____

SECTION II: PRIMARY BENEFICIARY(IES)

You must list **at least one** primary beneficiary. You cannot list yourself as a beneficiary. Be sure to indicate the percentage to be paid to each beneficiary. If you wish to elect more than two Primary Beneficiaries, you may submit their information on a separate sheet of paper.

Name _____ Relationship _____ % of Benefit _____

SSN _____ Phone _____ Email _____

Address _____

Name _____ Relationship _____ % of Benefit _____

SSN _____ Phone _____ Email _____

Address _____

SECTION III: SECONDARY BENEFICIARY(IES)

Secondary Beneficiaries will not receive survivor benefits unless all Primary Beneficiaries are deceased. For example, if you name two primary beneficiaries and one of them dies, the surviving Primary Beneficiary will receive 100% of the benefit. If you wish to elect more than two Secondary Beneficiaries, you may submit their information on a separate sheet of paper.

Name _____ Relationship _____ % of Benefit _____

SSN _____ Phone _____ Email _____

Address _____

Name _____ Relationship _____ % of Benefit _____

SSN _____ Phone _____ Email _____

Address _____

SECTION IV: SIGNATURE OF CONSENT

This is a confidential, legal document, which the participant or legal guardian of the participant must sign. I understand that if I am legally married for at least 12 months, my surviving spouse will automatically receive the "50% Joint and Survivor Pension" if I am to die before retirement and am vested – even if I elect someone else other than my spouse. **Electronic signatures are not accepted.**

Signature _____ Date _____ / _____ / _____