

IUOE LOCAL 825 PENSION FUND BENEFICIARY DESIGNATION

65 Springfield Avenue, Second Floor
Springfield, NJ 07081 | (973) 671-6800



This form is for use in designating who will receive your accrued benefit in the event of your death after vesting your accrued benefit but not yet retired. Should you make a mistake in completing this form, either complete a new form or initial the information that was changed. Altered forms cannot be accepted.

You must sign and date this form for your designation to be valid. The designations you make on this form replace any prior beneficiary designations.

You may designate more than one primary and contingent beneficiary. If you do, payment will be made in equal amounts to your beneficiaries, unless you specify the percentage share each should receive. If you need more space, attach another sheet to this form. Your vested benefit will be paid to your contingent beneficiary(ies) if no primary beneficiary(ies) are living at the time of your death.

If you are married, federal law guarantees your spouse the right to receive at least 50 percent of your vested benefit. If you are married and designate someone other than your spouse as a primary beneficiary, only 50 percent of your vested benefit will be paid to your beneficiary, assuming your spouse is alive at the time of your death. If you first perform an hour of service under the Pension Plan prior to July 1, 2012, your spouse may waive the guaranteed 50 percent share of your vested benefit in accordance with the rules of the Pension Plan.

A beneficiary designation becomes effective once the Pension Fund receives a form at the above address. If you are married and do not designate a beneficiary or no beneficiary survives you, your spouse shall receive 100% of your vested benefit. If you are unmarried and do not designate a beneficiary or no beneficiary survives you, your deemed beneficiary shall be your estate.

Participant's Name (please print) _____ Social Security No. _____

Mailing Address _____

Phone number _____ Cell phone number _____

Email Address _____

Primary Pension Fund Beneficiary

Name (please print) _____ Relationship _____

Mailing Address _____

Phone number _____ Cell phone number _____

Email Address _____

Beneficiary's Social Security No. _____ Beneficiary's Birth Date _____

Percentage Share of Account _____%

Primary Pension Fund Beneficiary

Name (please print) _____ Relationship _____

Mailing Address _____

Phone number _____ Cell phone number _____

Email Address _____

Beneficiary's Social Security No. _____ Beneficiary's Birth Date _____

Percentage Share of Account _____%

Attach additional sheet if needed to provide further primary beneficiary information.

Contingent Pension Fund Beneficiary

Name (please print) _____ Relationship _____

Mailing Address _____

Phone number _____ Cell phone number _____

Email Address _____

Beneficiary's Social Security No. _____ Beneficiary's Birth Date _____

Percentage Share of Account _____%

Contingent Pension Fund Beneficiary

Name (please print) _____ Relationship _____

Mailing Address _____

Phone number _____ Cell phone number _____

Email Address _____

Beneficiary's Social Security No. _____ Beneficiary's Birth Date _____

Percentage Share of Account _____%

Attach additional sheet if needed to provide further contingent beneficiary information.

Participant's Signature

Date