

Instructions for naming a beneficiary(ies) and information on death benefits are provided on the reserve side.

In compliance with the Federal Privacy Act of 1974, the disclosure of the individual's social security number on this form is mandatory pursuant to 26 U.S.C. § 3402. The individual's social security number is used for tax reporting and as an identification number. Penalty for not including the Social Security number may cause the form to not be processed.

MEMBER INFORMATION

Member Name (First, Middle, Last)		Person ID		Gender	Birth Date
Primary Mailing Address		City	State	ZIP Code (9-digit)	
<input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Widowed	Maiden Name	Name of Spouse (First, Middle, Last)			Gender
Work Telephone Number	Primary Telephone Number	E-mail Address			

BENEFICIARY INFORMATION

Primary Beneficiary Name* (First, Middle, Last)	Relationship	Social Security Number	Date of Birth	Gender	% Share	Address or Telephone Number
Total must equal					100%	

Contingent Beneficiary Name (First, Middle, Last) optional	Relationship	Social Security Number	Date of Birth	Gender	% Share	Address or Telephone Number
Total must equal					100%	

MEMBER SIGNATURE AND SPOUSAL CONSENT (IF REQUIRED)

I have read and understand the death benefit information on the reverse side. I designate the above-named beneficiary(ies) to my TFFR account.

Member Signature
Date

***If you are married and designate a beneficiary other than your spouse, your spouse must consent in writing to the alternate beneficiary (NDCC 15-39.1-17).**

I have read and understand the death benefit information on the reverse. I consent to the above-named beneficiary(ies) designated by the above named TFFR member.

Spouse Signature
Date

RETURN TO:

ND Retirement and Investment Office
PO Box 7100
Bismarck ND 58507-7100

Telephone: 701-328-9885
Fax: 701-328-9897
Toll free: 800-952-2970
Email: rio@nd.gov

INSTRUCTIONS FOR COMPLETING DESIGNATION OF BENEFICIARY FORM

Naming a Beneficiary

Completion of a **Designation of Beneficiary form (SFN 10341)** allows TFFR members to direct payment of a claim due to the member's death.

Primary Beneficiary

If you are married*, you must name your spouse as your primary beneficiary or provide written spousal approval to name an alternate. (*Same gender marriages are recognized as legal marriages in all states. Married same gender couples receive all the legal rights and benefits afforded to married opposite gender couples.)

If you are not married, or if you have written spousal consent, you can name any person (up to 10), organization, church, or charity as beneficiary of your retirement account.

If more than one beneficiary is named, beneficiaries are not eligible to receive a monthly annuity for life. They will share equally in the survivor benefit unless specific percentages are designated. If specific percentages are designated, they must equal 100 percent. If you require additional space to name multiple beneficiaries, attach a separate sheet.

If you do not designate a beneficiary, death benefits (if any) will be paid to your surviving spouse; if none, to your estate.

Contingent Beneficiary

Naming a contingent beneficiary or beneficiaries is **optional**. A contingent beneficiary should be designated if you do not wish survivor benefits to be paid in the order provided by state law (i.e., surviving spouse, estate). Benefits will be paid to your contingent beneficiary only if your primary beneficiary is deceased.

Death Benefits

If a member's death occurs prior to retirement, the beneficiary/survivor of a non-vested member will be eligible for a refund of account value (i.e., member contributions plus interest). Survivors of vested members will be eligible for: 1) refund of account value; or 2) monthly reduced annuity for life under 100% Joint and Survivor option (not available if more than one beneficiary is named). See Tier 1 and Tier 2 Member vesting descriptions.

If a member's death occurs after retirement, the death benefits your beneficiary/survivor receives (if any) is based on the plan select by the member at retirement.

Designation of beneficiaries is subject to the governing statutes and rules and regulations established by the TFFR Board of Trustees. The acceptance of this designation does not establish that a survivor benefit will be payable. Whether or not a benefit is payable, and the amount thereof will be determined at the time of death under laws and regulations then applicable.

This designation of beneficiary revokes any prior form. Please keep your designation current by updating your beneficiary if you marry, divorce, have children, or if your spouse or other beneficiary dies.

Additional beneficiary and death benefit information can be found in the TFFR Member Handbook on the Retirement and Investment Office (RIO) website, www.rio.nd.gov.

If you have any questions, please contact RIO.

This form is available in an alternate format upon request.