



Missouri State Employees' Retirement System
 PO Box 209 • Jefferson City, MO 65102-0209
 Phone: (573) 632-6100 • Toll Free: (800) 827-1063 • Fax: (573) 632-6103
 Email: forms@mosers.org • Website: www.mosers.org



Final Payment of Retirement/Survivor Benefits Change of Beneficiary(ies)

Please print. • See reverse side for instructions.

SECTION A - PERSONAL INFORMATION

Social Security Number or Member ID

Date of Birth

Name (last/first/middle)

Primary Phone

Alternate Phone

Alternate Phone

Cell Home Work

Cell Home Work

Cell Home Work

Email Address

SECTION B - BENEFICIARY DESIGNATION

Complete the information below to change the designated beneficiary(ies) of your final retirement/survivor benefit payment from MOSERS. If you are a member and a survivor annuity is payable, your current spouse will receive the payment, unless you designate someone else. Be sure your instructions are clear and that you provide as much information as possible as you are giving instructions to MOSERS on how to distribute your final payment. **Designation should include your beneficiary(ies) name, relationship, address, date of birth, and social security number.** You may also name a trust (include tax ID number and attach a photocopy of the trust, if available), corporation/organization, or estate as your beneficiary. This payment must be divided equally. **Examples are located on the back side of this form.**

Beneficiary _____

Beneficiary _____

Beneficiary _____

Beneficiary _____

SECTION C - APPLICANT SIGNATURE

I hereby change the beneficiary designation to receive my final benefit payment, to those listed above. I understand this form must be signed and dated by me and delivered to the office of MOSERS during my lifetime and this designation supersedes any prior designations. My beneficiary designation will take effect on the date this completed form is received by MOSERS.

Signature

Date

Instructions for Completing

Final Payment of Retirement/Survivor Benefits Change of Beneficiary(ies)

Your final retirement/survivor benefit payment is payable to your named beneficiary(ies) when you die. The *Final Payment of Retirement/Survivor Benefits - Change of Beneficiary(ies)* form allows you to change the beneficiary(ies) you elected at retirement. This form cannot be used to change your life insurance beneficiary(ies). This form must be signed by you, dated, and delivered to MOSERS during your lifetime. Your designation will be effective upon MOSERS' receipt of this form. Steps for completing this form are outlined below.

1. Complete Section A.
2. Designate your beneficiary(ies) in Section B.
 - Provide the full name, relationship, address, date of birth, and social security number of your beneficiary(ies).
 - If you have more than four beneficiaries and need additional space, you may attach a separate sheet of paper.
 - If your beneficiary designation is to a trust, attach a photocopy of the trust, if available.
 - Naming a minor (a person under the age of 18, except an emancipated minor) or estate as your beneficiary for your final payment may require that a conservator or other legal representative be appointed by a court before any payment can be issued. This could cause legal expenses for the beneficiary and delay in payment. Please take this into consideration when naming your beneficiary. As an alternative, you may wish to set up a trust to receive your assets upon your death. A trust is a legal arrangement through which a trustee manages the assets for your beneficiaries. If you would like to set up a trust, please contact an attorney.
 - The following EXAMPLES may be helpful in designating your beneficiary(ies).

Standard Beneficiary Designations

Beneficiary John C. Doe - husband
105 Williams Street, Jefferson City, MO 65109
Birth date: 4/18/1961 SS#: 222-22-2222

Beneficiary Designation to an Organization

Beneficiary First Baptist Church
216 Hawthorn Street, Jefferson City, MO 65109

Beneficiary Designation to a Trust

Beneficiary John Doe, Trustee
Sarah Doe Trust - Trust established 3/28/2011
Tax ID - 12-3456789
208 Elliott Street, Jefferson City, MO 65109

3. Sign and date Section C.
4. Return completed form to MOSERS.