



Beneficiary Designation County of San Diego



Instructions:

- Type or print legibly in ink. Return to Human Resources - Benefits Division, 5530 Overland Avenue, Suite 210 San Diego, CA 92123 or you may send via interoffice mail to: MS 0-7, via fax 858-467-9708, email to DHRBenefits.FGG@sdcounty.ca.gov. Please retain a copy for your records.
- Please fully complete this form and sign it if you wish to designate a beneficiary or if you want to change your existing beneficiary designation.

Insured (Employee) Information

Name (First, Middle Initial, Last)	Employee ID #	Policy # 158540
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I understand the following designation(s) apply to my basic life, supplemental life, AD&D policy (if enrolled), as well as my last pay check and any leave balance pay off. I also understand that I am automatically the beneficiary of my dependent's \$2,000 life insurance policy.

Beneficiary (ies) Designation

*P= Primary beneficiary, or first choice of beneficiary.

*C= Contingent beneficiary, or second choice if primary beneficiary (ies) are no longer living.

Note - Please indicate the percentage of benefit you would like each beneficiary to receive. All distributions must be done as full percentage only (in whole numbers, **no** decimal point). Your primary beneficiary (ies) should total 100% and if you list a contingent beneficiary (ies) that total should also total 100%.

Name(s)	Date of Birth	Relationship	Primary = P* Contingent = C*	Address	Percent of Benefits
				_____ _____	___ %
				_____ _____	___ %
				_____ _____	___ %
				_____ _____	___ %

**** If additional space is needed, attach a separate page and include all the information shown here****

Insured (Employee) Signature

Date

NOTE: If you are married and you do not name your spouse as the sole beneficiary, you should have your spouse sign below. Without your spouse's signature, it is possible that spousal rights may prevent the named beneficiary (ies) from receiving the total proceeds from the insurance coverage, your final pay check and any leave balance pay off.

I hereby consent to the foregoing designation of beneficiary (ies):

Spouse's Signature

Date

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GENERAL BENEFICIARY INFORMATION

What is a beneficiary designation?

Designating a beneficiary is naming the individual(s) to whom any death benefits payable from your life Insurance plan should be made, in the event of your death.

What is the difference between Primary and Contingent Beneficiary (ies)?

- **Primary Beneficiary (ies):** Individual(s) you name who should receive the life insurance benefits when you die. If more than one person is named primary beneficiary, death benefits are divided in equal proportions between the then-living beneficiaries or in accordance with your written designations. If no primary beneficiary is living, the benefits go to the contingent beneficiary.
- **Contingent Beneficiary(ies):** Individual(s) you name, who should receive the benefits to be paid if your primary beneficiary (ies) precedes you in death.

Who is a qualified beneficiary?

Any person, institution, trust, estate, etc., as primary or contingent beneficiary

NOTE:

Spouse. Without your spouse's signature consenting to the foregoing designation of beneficiaries as stipulated on the Beneficiary Assignment Form, it is possible that spousal rights may prevent the named beneficiary (ies) from receiving the total proceeds from the insurance coverage.

Minor Child. If you designate a minor child as your beneficiary, be sure to list information about the child's trustee or guardian as well. Benefits will not be paid directly to a minor child; failure to designate trustee or guardian information could result in a delay of benefits.

Must the percentages for all Primary and/or Contingent beneficiaries equal 100%?

Yes, the Primary Beneficiaries and/or Contingent Beneficiaries must equal 100%. Distributions must be done as full percentage only. (In whole numbers, no decimal points)

Examples of Designations

Name(s)	Date of Birth	Relationship	Primary = P* Contingent = C*	Address	Percent of Benefits
Jane Smith	xx/xx/xxxx	Spouse	P	<u>100 Alex Avenue</u> <u>San Diego, CA 92101</u>	<u>100</u> %
John Smith	xx/xx/xxxx	Son	C	<u>100 Alex Avenue</u> <u>San Diego, CA 92101</u>	<u>75</u> %
Jackie Clark	xx/xx/xxxx	Mother	C	<u>200 Ray Street</u> <u>San Diego, CA 92113</u>	<u>25</u> %
How to designate a trust					
Trustee(s) or Successor Trustee(s) as provided in the Anne Smith Public Trust Agreement dated XX/XX/XX, if valid. Otherwise to:		Trustee			<u>100</u> %
Sarah Smith	xx/xx/xxxx	Sister	P	<u>1234 Central Avenue</u> <u>Washington, DC 20019</u>	<u>100</u> %

Do I send a separate form for my Retirement Benefits & Deferred Compensation?

Yes. You must contact Retirement office (619) 515-6800 and Deferred Comp at (619) 531-5840 for their beneficiary designation forms.