

---

## Instructions for Judge Member Service: Post-Retirement Beneficiary Designation

Important: Read instructions before you complete and submit the enclosed form.

**It is important that you file a Designation of Beneficiary form with PERS for each program in which you are a member.** If you die after retirement and there is no designation of beneficiary on file, distribution will be made in accordance with statute. Forms for all programs can be found on the PERS website at <http://oregon.gov/pers>.

### Surviving spouse pension

The surviving spouse of a judge member is the automatic recipient of a surviving spouse pension under ORS 238.565 unless a prenuptial or antenuptial agreement stating otherwise has been filed with PERS. You may elect to have a former spouse receive all or a portion of the pension payable to a surviving spouse. See ORS 238.565(8). To make this election, you must also complete a [Judge Member Election of Former Spouse as a](#)

### General instructions

General instructions

- Type or print clearly in dark ink. Illegible forms may be returned, which could delay your request.
- Do not change anything on the form; alterations will void the form.
- Sign and date the statement at the bottom of the form, and mail or fax the form to PERS.

### Section A: Member information (Type or print clearly in dark ink. Illegible forms could be returned to you, delaying your request.)

Fill in the personal information block completely.

Providing your Social Security number (SSN) is voluntary. It will be used for confirmation purposes. If you choose not to supply your SSN, it may take PERS staff longer to process your form.

If you do not know your PERS ID, leave it blank.

### Section B: Spouse information

Provide information on your current spouse in the space provided.

If you are electing to have a former spouse receive all or a portion of the pension payable, check the box in Section B. You must also complete a [Judge Member Election of Former Spouse as a Pension Recipient](#) form.

### Section C: Beneficiary Designation

**Check the appropriate box** to let us know if you want to use the standard beneficiary designation or to name a specific beneficiary.

When you choose the standard designation, you do not name any specific person. Instead, your beneficiary selection follows the order described in law.

**The standard designation directs PERS to pay benefits in the order listed below:**

- 1) To your spouse if you are legally married at the time of your death. If you are not, then to
- 2) your child\* or children in equal shares. If any of your children are deceased, their portion is equally divided between their children who are alive at your death. If all of your children predecease you, their equal shares will be paid to their children. If there is no one in this group, then
- 3) to your mother and father in equal shares. If one of them predecease you, their share is paid to the other parent. If both parents predecease you, then

4) to your brothers and sisters in equal shares. If any one of them predecease you, their share will be paid to that sibling's children equally. If all of your brothers and sisters predecease you, all of their children will share equally. If there is no one in this group, then

5) payment will be made to your estate.

\*Natural born and adopted children are considered "children" even if you selected the standard designation before or after their adoption or birth. If your children are adopted by someone else, they are not considered your "children" under the standard designation. If you wish to name the adopted-out children as your beneficiary, use the specific designation part of this form.

**If you elect to name specific beneficiaries**, you must list each beneficiary, your relationship to the beneficiary, and the percentage of your benefit you want to go to each person or entity you named. See Appendix C, [page 29](#), of the *Tier One/Tier Two and Individual Account Program (IAP) Pre-Retirement Guide* for an example of "specific retiree designation of beneficiary."

If you have more than three beneficiaries, attach an additional sheet of paper that includes all the same information listed in the table for each beneficiary. Include your name and SSN at the top of each additional paper.

If you have a complex beneficiary situation, you may want to consult an estate planning attorney.

#### **Section D: Estate designation - I designate my estate as my beneficiary.**

If you want to designate your estate as the beneficiary. Enter the name of the personal representative and the address in the space provided.

#### **Section E: Trust designation - I designate my trust as my beneficiary.**

If you want to designate your trust as the beneficiary. Enter the legal name of the trust, the name of the trustee, the address, and the date the trust was established in the space provided.

#### **Section F - Member signature (required)**

Your signature is required. Be sure to sign and date where indicated.



## Judge Member Service: Post-Retirement Beneficiary Designation

**Section A: Member information** (Type or print clearly in dark ink. Illegible forms could be returned to you, delaying your request.)

First name		MI	Last name		Social Security number*
Mailing address (street or PO box)					PERS ID
City			State	ZIP code	Country
Home phone number	Work phone number	Cell phone number		Personal email	

**Section B: Spouse information**

First name		MI	Last name		Social Security number*
Mailing address (street or PO box)					Date of birth (mm-dd-yyyy)
City			State	ZIP code	Country
Home phone number	Work phone number	Cell phone number		Personal email	

**Optional Election.** I am also electing to have all or a portion of my surviving spouse's pension paid to a former spouse.

Yes. You must complete a Judge Member Election of Former Spouse as a Pension Recipient form.

\*Providing your Social Security number (SSN) is voluntary. It will be used for confirmation purposes. If you choose not to supply your SSN, it could take PERS staff longer to process your form. In compliance with the Americans with Disabilities Act, PERS will provide help filling out this form upon request. You can request help by calling 888-320-7377 or TTY 503-603-7766.

## Section C: Beneficiary Designation

- I elect to use the **standard** beneficiary designation. Do not list specific beneficiary name(s) in the table below.  
 I elect to use the **specific** designation of beneficiary.

If you designate specific beneficiaries you must include the percentage of the account distributed to each. The total percentage must equal **100 percent**. Complete the table below. Add additional beneficiaries on a separate sheet of paper.

How many beneficiaries do you want to designate? \_\_\_\_\_

### Specific beneficiary #1

**Primary beneficiary** If living; otherwise, to #1 alternate beneficiary(ies).

#1	Name of person or charity	Social Security #	Date of birth	Relationship	Percentage

**Alternate beneficiary(ies):** How many alternate beneficiaries do you want to designate? \_\_\_\_\_

(Benefit will go to those named below if #1 specific beneficiary is deceased.)

#1a	Name of person or charity	Social Security #	Date of birth	Relationship	Percentage
#1b	Name of person or charity	Social Security #	Date of birth	Relationship	Percentage

### Specific beneficiary #2

**Primary beneficiary** If living; otherwise, to #2 alternate beneficiary(ies).

#2	Name of person or charity	Social Security #	Date of birth	Relationship	Percentage

**Alternate beneficiary(ies):** How many alternate beneficiaries do you want to designate? \_\_\_\_\_

(Benefit will go to those named below if #2 specific beneficiary is deceased.)

#2a	Name of person or charity	Social Security #	Date of birth	Relationship	Percentage
#2b	Name of person or charity	Social Security #	Date of birth	Relationship	Percentage

### Specific beneficiary #3

**Primary beneficiary** If living; otherwise, to #3 alternate beneficiary(ies).

#3	Name of person or charity	Social Security #	Date of birth	Relationship	Percentage

**Alternate beneficiary(ies):** How many alternate beneficiaries do you want to designate? \_\_\_\_\_

(Benefit will go to those named below if #3 specific beneficiary is deceased.)

#3a	Name of person or charity	Social Security #	Date of birth	Relationship	Percentage
#3b	Name of person or charity	Social Security #	Date of birth	Relationship	Percentage

- If any of the above named primary beneficiaries predecease me and I have not named an alternate beneficiary, I want the portion of my benefit that was designated to that beneficiary shared equally among the remaining primary beneficiaries living at my death.

**Section D: Estate designation - I designate my estate as my beneficiary.**

I designate my estate as my beneficiary.

Name of personal representative: \_\_\_\_\_

Address: \_\_\_\_\_

**Section E: Trust designation - I designate my trust as my beneficiary.**

I designate my estate as my beneficiary.

Legal name of trust (e.g., The Sara Smith Living Trust): \_\_\_\_\_

Name of trustee: \_\_\_\_\_

Address: \_\_\_\_\_

Date trust established: \_\_\_\_\_

**Section F - Member signature (required)**

I revoke all previous judge member beneficiary designations.

\_\_\_\_\_  
Applicant signature (do not print)

\_\_\_\_\_  
Date