

Instructions

Please type or print clearly with a ball-point pen. All sections, including both beneficiary designation sections, must be completed for processing. **You must sign and date for the beneficiary designation or change to be valid.** This beneficiary designation cancels all prior designations for Basic and Supplemental Life Insurance. Please mail completed form to: Human Resources Department.

Please check one: Beneficiary Designation Beneficiary Change

Employee and Plan Information

Member Name (Last, First, M.I.)	Social Security Number	Date of Birth
Your Mailing Address	City	State Zip
Group Name Montana University System	Group Number 643129	

Basic Life/AD&D Beneficiary Designation

This designation applies to Basic Life/AD&D insurance under the Group Insurance Policy. Designations are not valid unless signed, dated, and delivered to your Human Resources Department for Basic Life insurance during your lifetime. If you do not complete this section, your Basic Life/AD&D benefit will be paid by order of the policy. See page 3 for further beneficiary information.

Primary – Full Name	Address/Phone	Soc. Sec. No.	Relationship	% of Benefit
Contingent – Full Name	Address/Phone	Soc. Sec. No.	Relationship	% of Benefit

X _____	_____
Signature of Member	Date

Supplemental Life Beneficiary Designation

This designation applies to Supplemental Life insurance under the Group Insurance Policy. Designations are not valid unless signed, dated, and delivered to your Human Resources Department for Supplemental Life Insurance during your lifetime. If you do not complete this section, your Supplemental Life benefit will be paid by order of the policy. See page 3 for further beneficiary information.

Primary – Full Name	Address/Phone	Soc. Sec. No.	Relationship	% of Benefit
Contingent – Full Name	Address/Phone	Soc. Sec. No.	Relationship	% of Benefit

X _____ Date _____
Signature of Member

Beneficiary Examples

Two Primary Beneficiaries:				
Peter Smith	77 America St, Anytown, USA 77777	000-00-7777	Husband	60%
Anna Smith	777 USA St, Anytown, USA 77777	000-00-7899	Daughter	40%
One Primary & One Contingent Beneficiaries:				
Primary:				
Peter Smith	77 America St, Anytown, USA 77777	000-00-7777	Husband	100%
Contingent:				
Quincy Smith	789 Tree St, Anytown, USA 77777	000-00-7900	Son	100%

Beneficiary Information

- Your designation revokes all prior designations.

Benefits are only payable to a contingent Beneficiary if you are not survived by one or more primary Beneficiary(ies).

- If you name two or more Beneficiaries in a class:
 1. Two or more surviving Beneficiaries will share equally, unless you provide for unequal shares.
 2. If you provide for unequal shares in a class, and two or more Beneficiaries in that class survive, we will pay each surviving Beneficiary his or her designated share. Unless you provide otherwise, we will then pay the share(s) otherwise due to any deceased Beneficiary(ies) to the surviving Beneficiaries pro rata based on the relationship that the designated percentage or fractional share of each surviving Beneficiary bears to the total shares of all surviving Beneficiaries.
 3. If only one Beneficiary in a class survives, we will pay the total death benefits to that Beneficiary.
- Dependents Insurance, if any, is payable to you, if living, or as provided under your Employer's coverage under the Group Policy.
- If a minor (a person not of legal age), or your estate, is the Beneficiary, it may be necessary to have a guardian or a legal representative appointed by the court before any death benefit can be paid. If the Beneficiary is a trust or trustee, the written trust must be identified in the Beneficiary designation. For example, "Dorothy Q. Smith, Trustee under the trust agreement dated _____."
- A power of attorney must grant specific authority, by the terms of the document or applicable law, to make or change a Beneficiary designation. If you have questions, consult your legal advisor.