

**NO ERASURES  
TYPE OR USE INK**

**THE ARCHDIOCESE OF LOS ANGELES  
LAY EMPLOYEES PENSION PLAN  
BENEFICIARY DESIGNATION**

**This designation  
supersedes and replaces  
all previous designations  
under this Plan.**

**EMPLOYEE INFORMATION**

Employee Name \_\_\_\_\_ Social Security No. \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_ Phone No. \_\_\_\_\_

**IMPORTANT NOTICE**

If **you are legally married**, your primary beneficiary is automatically your spouse. Neither you nor your spouse may elect otherwise. Sample designations can be found on the opposite side of this page. Sample designations in **bold type** mean your spouse is your primary beneficiary.

If **you are not married**, your primary beneficiary is any person that you designate to receive death benefits under the plan, if any are payable. See sample designations on the opposite side of this page.

Regardless of your marital status, it is important to designate a beneficiary, and to keep your designation up-to-date. If you fail to designate a beneficiary, or your beneficiary is not living at the time of your death, then the benefits due will be paid in accordance with the plan and the plan's administrative procedures.

Should your spouse or other beneficiary fail to survive you by at least 30 days, or if you and your beneficiary die in a common accident or disaster, you will have been deemed to have died last.

**BENEFICIARY DESIGNATION**

Please read the **Important Notice** section above before making your designation. Attach a separate page if more space is necessary.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Beneficiary Address \_\_\_\_\_  
\_\_\_\_\_

**Use separate page if more than one address and indicate name of each addressee.**

**EMPLOYEE SIGNATURE**

I hereby make the above designation, revoking and replacing all previous designations under this plan. I understand if I am legally married at my death, my spouse has priority over any other claim presented.

Signature of Employee \_\_\_\_\_ Date \_\_\_\_\_

**FOR PLAN USE ONLY**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**THIS DESIGNATION IS NOT VALID UNTIL RECEIVED BY PENSION SERVICES ON  
BEHALF OF THE PLAN.**  
Mail this form to the address on the reverse side.

## INSTRUCTIONS

1. Use this form to designate or change your primary and/or secondary beneficiary.
2. Where more than one primary and/or secondary beneficiary is designated, the amount to be paid to each beneficiary must be clearly set forth by designating fractions or portions to be received.
3. Your secondary beneficiary will receive a benefit only if (a) your primary beneficiary dies before you, or (b) your primary beneficiary dies before receiving the total survivor benefit.
4. If you wish to designate a minor as beneficiary, appointment of a custodian is recommended (see sample designation #12 below). If a minor (or other person incapable of giving valid receipt) is designated beneficiary and has no surviving parent, custodian or conservator, the Plan Administrator may direct that payment be made to the person or institution responsible for the care and maintenance of such individual.
5. The proper wording for typical nominations of beneficiary is shown below. In the event none of the following nominations provide the disposition desired, you should consult your attorney.

Type of Beneficiary	Language To Be Used
1. Estate	Estate
2. One Primary Beneficiary	Peter Jones, father.
3. Two Primary Beneficiaries	Peter Jones, father and Anna Jones, mother, equally, or the survivor.
4. Three or More Primary Beneficiaries	Peter Jones, father, Anna Jones, mother, and Mary Jones, daughter, or the survivors, equally or the survivor.
5. <b>One Primary Beneficiary and One Secondary Beneficiary</b>	<b>Dorothy Q. Jones, spouse, if living, otherwise Mary Jones, daughter.</b>
6. <b>One Primary Beneficiary and Two Secondary Beneficiaries</b>	<b>Dorothy Q. Jones, spouse, if living, otherwise Mary Jones, daughter, Quincy Jones, son, equally, or the survivor.</b>
7. <b>One Primary Beneficiary and Three or more Secondary Beneficiaries</b>	<b>Dorothy Q. Jones, spouse, if living, otherwise Mary Jones, Quincy Jones, and Edna Jones, children, or the survivor, or survivors, equally.</b>
8. <b>One Primary Beneficiary and Unnamed Children as Secondary Beneficiaries</b>	<b>Dorothy Q. Jones, spouse, if living, otherwise the children born of the marriage of the designator and said wife, or the survivor, or the survivors, equally.</b>
9. Two Primary Beneficiaries and One Secondary Beneficiary	Peter Jones, father, and Anna Jones, mother, equally, or the survivor, if either survives; otherwise Mary Jones, daughter.
10. Two Primary Beneficiaries in Unequal Shares	Peter Jones, father, as to three-fourths (3/4) and Anna Jones, mother, as to one-fourth (1/4), or the survivor.
11. Revocable Inter Vivos Trust	Surviving Trustee(s) under the Trust Agreement Establishing the [Name of trust, such as "Peter and Dorothy Jones Revocable Trust"] dated [date trust agreement signed].
12. Minor Child	[Name of child], if at least age _____ [not less than 18 or more than 24] at my death; if younger, to [Name of adult to serve as custodian] as custodian for [Name of child] under the Uniform Transfers to Minors Act.

Designations in bold type mean your spouse is your primary beneficiary

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### QUESTIONS AND RETURN ADDRESS

Pension Services  
P.O. Box 117  
San Francisco, CA 94104-0117  
Toll-free: 866/907-5472