

DESIGNATE Your Investment Plan BENEFICIARIES



How to Designate Your Beneficiary

Use **one** of these three ways to designate the beneficiary or beneficiaries you want to receive your Investment Plan account balance upon your death:

1. Complete the online [FRS Investment Plan Beneficiary Designation Form](#).
2. Download and complete the [FRS Investment Plan Beneficiary Designation Form](#) and mail or fax it to the Investment Plan Administrator:
 - **By mail:** FRS Investment Plan Administrator, P.O. Box 785027, Orlando, FL 32878-5027
 - **By fax:** 1-888-310-5559
3. Log in to [MyFRS.com](#) and choose Investment Plan > choose your profile icon > select “Beneficiaries” from drop-down menu.



FRS INVESTMENT PLAN BENEFICIARY DESIGNATION FORM

FRS Investment Plan

Last 4 digits of SSN: _____ Last Name: _____ First Name: _____ MI: _____

Birth Date: _____ Mobile Telephone: _____ Home Telephone: _____ Personal E-Mail: _____

You may designate one or more individuals as your beneficiary to receive your assets, if any, in the FRS Investment Plan in the event of your death. You may designate one person, organization or trust, or your estate. Contingent beneficiaries are optional and must be different than your primary beneficiaries — they will inherit your FRS Investment Plan Account if all primary beneficiaries are deceased. Enter all required information for each beneficiary. If you need to add more than 1 primary or contingent beneficiary, make a copy of this page and attach it to this form. You may change your beneficiary at any time by logging in MyFRS.com or by completing a new Beneficiary Designation form (SDDC). If you are participating in the FRS Inflation Option, your beneficiary named below for the Investment Plan will not affect your selected beneficiary in the Pension Plan. Additionally, Section 112.303(3)(c)2, F.S., provides that only a spouse who is named as the primary designated beneficiary is eligible to receive the Health Insurance Subsidy (HIS) under the Investment Plan.

Marital Status: Check One Box

Single

Married Spouse Name: _____ Last 4 digits of SSN: _____ Address: _____

Beneficiary percentages below must be in whole percent and must total 100%. If the total does not equal 100%, the designation will not be processed. The percentage payable to a beneficiary who dies before you will be paid equally among the surviving primary beneficiaries.

Primary Beneficiaries

Name of Primary Beneficiary	Date of Birth	Relationship	Gender	Last 4 SSN	Percent Payable
1. _____	_____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____	_____
					Total = 100%

Contingent Beneficiaries

Name of Contingent Beneficiary	Date of Birth	Relationship	Gender	Last 4 SSN	Percent Payable
1. _____	_____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____	_____
					Total = 100%

I understand that the execution of this form and receipt thereof by the Investment Plan Administrator will make all prior designations I have made. I understand I have the right to change the designation at any time and it will be effective only upon receipt by the Investment Plan Administrator. I understand that if I am married and have named someone other than my spouse as my primary beneficiary, my spouse needs to sign this designation in the box below.

Signature of Member: _____ Date: _____

Spousal Acknowledgment: By signing below, I hereby acknowledge that, as the spouse of the Member named above, I am aware that my spouse designated someone other than me as a Primary Beneficiary of any death benefit provided by the FRS Investment Plan.

Signature of Spouse: _____ Date: _____

If your spouse cannot be located or refuses to sign, reach out to the FRS Investment Plan Administrator immediately at 1-888-446-9377, Option 4. With your completed form to: FRS Investment Plan Administrator, P.O. Box 785027, Orlando, FL 32878-5027 OR FAX your completed form to: 1-888-310-5559 Attention: FRS Investment Plan Administrator.

FRS 6.1 Rev. 07/2020 10-11-2021 F.A.C.

Have Questions?

Call the MyFRS Financial Guidance Line at 1-866-446-9377, Option 4 (TRS 711).

[Complete the Form Online](#) ▶

[Download the Form Here](#) ▶

[View in web browser](#) | [Share](#)

This message was sent by an automated, unattended email address. Please do not reply. If you have questions, please contact the MyFRS Financial Guidance Line at 1-866-446-9377, Option 1 or info@myfrs.com.

EMAIL SUBJECT LINE: **Act Now! Make Your Investment Plan Beneficiary Designation Today!**

PREVIEW TEXT: If your beneficiary designations are missing from your Investment Plan account, Florida law will determine who receives your account balance upon your death.