

DESIGNATE Your Investment Plan BENEFICIARIES



Don't Make Life Harder for Your Loved Ones
Take Control of Your Future

Missing: Your Beneficiary Designations

What happens if you die and your family no longer has you or your income to rely on? If your beneficiary designations are still missing from your Florida Retirement System Investment Plan account when you die, Florida law will determine who receives your benefit.

Whether you're married, single or have children, having your beneficiary designation in place will make your loved ones' transition to the new normal a little easier and ensure your wishes are carried out.

Don't wait until it's too late. Designate your beneficiaries today!

Mail or fax the enclosed FRS Investment Plan Beneficiary Designation Form to the attention of the Investment Plan Administrator.

- **By mail:** FRS Investment Plan Administrator, P.O. Box 785027, Orlando, FL 32878-5027
- **By fax:** 1-888-310-5559

FRS INVESTMENT PLAN
BENEFICIARY DESIGNATION FORM

Investment Plan

Last 4 digits of SSN	Last Name	First Name	MI
Birth Date	Daytime Telephone	Mobile 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 any 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 3 primary or contingent beneficiaries, 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. **NOTE:** If you are participating in the FRS Hybrid Option, your beneficiary named below for the Investment Plan will not affect your selected beneficiary in the Pension Plan. Additionally, Section 112.363(3)(e)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 revoke all prior designations I may have made. I understand I have the right to change this 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 Acknowledgement: 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 benefits 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 1-866-446-6377, Option 4.

MAIL your completed form to: FRS Investment Plan Administrator, PO Box 786027, Orlando, FL 32878-6027
OR FAX your completed form to: 1-888-310-5559 | Attention: FRS Investment Plan Administrator.

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TAKE CONTROL of YOUR FUTURE

Take action immediately!

Take Action

Use one of these three ways to add beneficiaries to your Investment Plan:



Complete the online FRS Investment Plan Beneficiary Designation Form at myfrs.com/imageserver/IPBForm.htm.



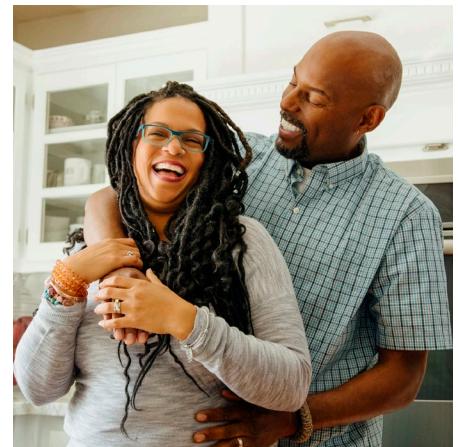
Complete the enclosed FRS Investment Plan Beneficiary Designation Form and mail or fax it to the Investment Plan Administrator.

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Log in to MyFRS.com and choose Investment Plan > choose your profile icon > select “Beneficiaries” from drop-down menu.

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



Keep Your Beneficiaries Up to Date

Even after you’ve designated your beneficiaries, it’s a good idea to review them from time to time and make updates if you:

- Designated a beneficiary who is now deceased;
- Designated a beneficiary who experienced a name change;
- Changed your marital status;
- Designated an individual you no longer wish to have as a beneficiary; or
- Add a new beneficiary.

