

# WHO'S YOUR PENSION PLAN BENEFICIARY?

Designating a beneficiary on your retirement plan account is one of the best things you can do to ensure your assets go to the people you choose. Please take a moment to name at least one beneficiary for your [Client Plan Name].



## WHY IT'S IMPORTANT

A will is an excellent estate-planning tool, but it doesn't cover retirement benefits such as your pension plan. This could lead to added stress and administrative work for your heirs, so it's important to establish and maintain a beneficiary designation separate from your will.



## MAINTAIN BENEFICIARY DESIGNATIONS

Sign in to your account at [URL]. Select your account and then click on **Beneficiary** in the left-hand menu, where you'll be able to add or make updates to designations and related information.

Please note you might need spousal consent if you designate a primary beneficiary other than your spouse.



## KEEP YOUR DESIGNATION CURRENT

Life's circumstances are always changing — more often than we expect. When you or your loved ones experience life events such as marriage, divorce, the birth of a child, or a death in the family, you may want to review your designations to make sure they are up to date. It's worth reviewing your will or other estate planning documents as well.

If you need assistance, call us: [800-755-5801]. We're available Monday through Friday, [8 a.m. to 8 p.m. ET.]. Customer service for the hearing and speech impaired is available through TTY technology and a special toll-free number: **877-798-1794**.

## Designate a beneficiary

Think ahead. Take action now.

 **Visit:** [URL]

 **Contact:** [xxx-xxx-xxxx]

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