



**Chicago Regional Council of Carpenters Pension Fund**  
**12 E. Erie Street – Chicago, IL 60611**  
**(312) 787-9455, Phone Option 4**



**SUPPLEMENTAL RETIREMENT PLAN BENEFICIARY DESIGNATION FORM**

Participant's Last Name			First Name in Full			Middle Name in Full		
Date Of Birth		Gender	Marital Status			Social Security Number		
MONTH	DAY	YEAR	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Single	<input type="checkbox"/> Married	<input type="checkbox"/> Separated	-	-
				<input type="checkbox"/> Divorced	<input type="checkbox"/> Widowed			

**INSTRUCTIONS / WHAT YOU NEED TO KNOW BEFORE YOU BEGIN:**

Please print clearly in CAPITAL LETTERS using only blue or black ink. Do not scratch out or use whiteout. If you make a mistake, you must fill out a new form. You must complete this form in full, sign it on the reverse side, have your signature witnessed, and return it to the Pension Fund Office. You may wish to retain a copy of this form for your records. **This Beneficiary Designation shall become effective on the date the completed form is received by the Pension Fund Office.** Receipt of this form is not a guarantee of eligibility for benefits.

A primary beneficiary is your first choice to receive the death benefit from the Supplemental Retirement Plan. If you name more than one primary beneficiary and if one of the primary beneficiaries does not survive you, the benefit due will be allocated proportionately among the remaining primary beneficiaries. If you are married and name a primary beneficiary other than (or in addition to) your spouse, spousal consent **MUST** be provided on the reverse side of this form.

A contingent beneficiary is your second choice to receive the death benefit from the Supplemental Retirement Plan if your primary beneficiary(ies) is (are) not living at the time of your death. If you designate more than one primary beneficiary, all primary beneficiaries must have died before any of the contingent beneficiaries are entitled to receive benefits. If you name more than one contingent beneficiary and if one of the contingent beneficiaries does not survive you, the benefit due will be allocated proportionately among the remaining contingent beneficiaries.

If you want to name more than three primary or contingent beneficiaries, please contact the Pension Fund Office to request an additional form.

If complicated or unusual circumstances are involved, you may wish to consult with an attorney regarding the formal beneficiary designation most suitable to your situation. **You should review your beneficiary designation any time your marital status changes, you have a child, or you experience another major life event.**

- The following information is required for each beneficiary:
- Beneficiary's full name (e.g. Mary B. Jones, not Mrs. John J. Jones);
  - Relationship to Participant (if not related to Participant, show as %friend%);
  - Address, Birth date, and Social Security Number or ITIN

The share percent must equal a total of 100% for the primary beneficiaries and must equal a separate total of 100% for the contingent beneficiaries. (Example: 100% Wife or 50% Wife/50% Daughter, or 50% Mother/25% Sister/ 25% Brother, etc.)

**DESIGNATION OF PRIMARY BENEFICIARY**

I designate the following as my primary beneficiary(ies):

Primary Beneficiary's First Name		M.I.	Last Name	
Relationship to Participant	Birth Date of Beneficiary	SS# or ITIN of Beneficiary		Share Percent
Street Address of Beneficiary		City	State	Zip
Primary Beneficiary's First Name		M.I.	Last Name	
Relationship to Participant	Birth Date of Beneficiary	SS# or ITIN of Beneficiary		Share Percent
Street Address of Beneficiary		City	State	Zip
Primary Beneficiary's First Name		M.I.	Last Name	
Relationship to Participant	Birth Date of Beneficiary	SS# or ITIN of Beneficiary		Share Percent
Street Address of Beneficiary		City	State	Zip

**(BE SURE TO COMPLETE THE REVERSE SIDE OF THIS FORM)**

**DESIGNATION OF CONTINGENT BENEFICIARY**

I understand that all primary beneficiaries must have died before the contingent beneficiaries are entitled to receive benefits.  
I designate the following as my contingent beneficiary(ies):

Contingent Beneficiary's First Name	M.I.	Last Name		
Relationship to Participant	Birth Date of Beneficiary	SS# or ITIN of Beneficiary		Share Percent
Street Address of Beneficiary		City	State	Zip
Contingent Beneficiary's First Name	M.I.	Last Name		
Relationship to Participant	Birth Date of Beneficiary	SS# or ITIN of Beneficiary		Share Percent
Street Address of Beneficiary		City	State	Zip
Contingent Beneficiary's First Name	M.I.	Last Name		
Relationship to Participant	Birth Date of Beneficiary	SS# or ITIN of Beneficiary		Share Percent
Street Address of Beneficiary		City	State	Zip

**SPOUSAL CONSENT – REQUIRED IF SPOUSE IS NOT THE SOLE PRIMARY BENEFICIARY**

I am the current legal spouse of the Participant. I have voluntarily consented to permit my spouse to name a beneficiary other than me to receive the death benefit due (if any) from the Chicago Regional Council of Carpenters Supplemental Retirement Plan. I acknowledge and understand that:

- (1) the effect of my consent will be to forfeit benefits I would otherwise be entitled to receive from the Chicago Regional Council of Carpenters Supplemental Retirement Plan upon my spouse's death
- (2) my spouse's designation of another primary beneficiary for benefits from the Chicago Regional Council of Carpenters Supplemental Retirement Plan is not valid unless I consent to it
- (3) my consent is irrevocable unless my spouse revokes the designation or unless otherwise provided for under a Qualified Domestic Relations Order.

Signature of Spouse \_\_\_\_\_ Date Signed by Spouse \_\_\_\_\_

**TO BE COMPLETED BY A NOTARY PUBLIC:**

State of \_\_\_\_\_ County of \_\_\_\_\_

Signed before me this \_\_\_\_\_ day of \_\_\_\_\_ in the year \_\_\_\_\_

My Commission Expires \_\_\_\_\_

(NOTARY SEAL)

Signature of Notary Public \_\_\_\_\_

**READ THE FOLLOWING CAREFULLY BEFORE SIGNING:** I hereby revoke any and all previous Supplemental Retirement Plan beneficiary designations and hereby designate those named on this form as my beneficiary(ies). I understand that I may change my beneficiary designation(s) at any time by completing a new Supplemental Retirement Plan Beneficiary Designation Form. Such change shall become effective when the new form is received by the Chicago Regional Council of Carpenters Pension Fund Office.

<b>Participant Sign Here</b>	Participant's Signature in Full	Date Signed		
		Month	Day	Year
<b>Witness Sign Here and Provide Address</b>	Witness's Signature in Full	Date Signed		
		Month	Day	Year
	Street Address of Witness	City	State	Zip

**FOR PENSION FUND OFFICE USE ONLY**

Date Received	Entered (Date & Initials)
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