

LRS Member Change of Beneficiary Form

Instructions

You can change your beneficiary at any time by logging in to your account at ers.ga.gov

This form is for LRS Members to update beneficiaries for their retirement plan benefit.

- LRS Retiree: Use the LRS Retiree Change of Beneficiary Form or change your beneficiary online at ers.ga.gov.
- Covered for ERSGA Group Term Life Insurance (GTLI): Use the GTLI Change of Beneficiary Form or change your beneficiary online at ers.ga.gov.

If you are a Member or Retiree of one of the below retirement systems, change your beneficiary online or use the form appropriate for that system:

- Employees' Retirement System (ERS)
- Public School Employees Retirement System (PSERS)
- Georgia Judicial Retirement System (JRS)
- Georgia Defined Contribution Plan (GDGP)

Complete, sign, and mail or upload this **original form** to ERSGA along with a copy of a **valid photo identification**. Do not email or fax. Valid photo identification is one of:

- A Georgia Driver's License, even if expired
- Valid U.S. passport ID, U.S. military photo ID, or tribal photo ID
- Any valid state or federal government-issued photo ID, including a free ID Card issued by your county registrar's office or the Georgia Department of Driver Services (DDS)

Changes are not valid until received by ERSGA. A Will does not take precedence over this designation.

Sections 1 and 3: Your Information and Signature

Section 1: Complete all information.

Section 3: Sign and date. Incomplete forms are not valid.

Section 2: Retirement Benefit Beneficiary Information

- Primary and secondary beneficiaries do not share benefits. Benefits will only be paid to a secondary beneficiary if all primary beneficiaries pre-decease you.
- If you wish to name multiple beneficiaries, please write "see attached" on this form. On a separate sheet of paper, write the names, percentage of benefit to each beneficiary (must total 100%), and other requested information. You must sign and date the separate sheet, include your Social Security Number (SSN) in the upper right hand corner, and attach to this form.
- "Estate" is only appropriate as a designation if no monthly allowance is left to a beneficiary. A monthly allowance cannot be paid to an estate.

Benefits Upon Death: Upon your death, your beneficiary(ies) will receive a monthly benefit only if one of these three conditions apply:

- You have 15 or more years of creditable service; OR
- You are age 60 or older and you have at least 8 years of membership service or 4 terms in office; OR
- You are age 65 or older and you have at least 8 years of creditable service.

Otherwise, your beneficiary(ies) will receive a refund of your contributions and interest.

For more information, see the LRS Handbook on the ERSGA website: ers.ga.gov

If you have any questions about Death Benefits, please contact ERSGA at 404-350-6300.

Online: For faster service, you can change your beneficiaries online.

To use this form, complete, sign, and upload, along with a copy of a **valid photo identification**. Upload by scanning the documents (use a home scanner or mobile app), log in to your ERSGA account at ers.ga.gov, and click on the *File Upload* link. Allow two business days after uploading a document for it to be available to ERSGA staff.

Mail: Complete, sign, and mail this **original form** along with a copy of a **valid photo identification** to:

ERSGA
Two Northside 75, Suite 300
Atlanta, GA 30318-7778



LRS Member Change of Beneficiary Form

Complete, sign, and mail or upload this **original form** to ERSGA along with a copy of a **valid photo identification** and any other required documentation. Do not email or fax. Changes are not valid until received by ERSGA.

Section 1: Member Information

Your Information

<p>First Name _____</p> <p>Middle Initial _____</p> <p>Last Name _____</p> <p>SSN _____</p> <p>Date of Birth _____ (mm/dd/yyyy)</p>	<p>Mailing Address _____</p> <p>City _____</p> <p>State _____</p> <p>Zip _____</p> <p>Phone _____</p> <p>Email _____</p>
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Section 2: Retirement Benefit Beneficiaries

A. Primary

<p>First Name _____</p> <p>Middle Initial _____</p> <p>Last Name _____</p> <p>Relationship to _____</p> <p>Date of Birth _____</p>	<p>Mailing Address _____</p> <p>City _____</p> <p>State _____</p> <p>Zip _____</p> <p>Phone _____</p>
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B. Secondary

<p>First Name _____</p> <p>Middle Initial _____</p> <p>Last Name _____</p> <p>Relationship to _____</p> <p>Date of Birth _____</p>	<p>Mailing Address _____</p> <p>City _____</p> <p>State _____</p> <p>Zip _____</p> <p>Phone _____</p>
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Section 3: Signature & Acknowledgement

I acknowledge:

- I have read and understand the instructions on Page 1 and 2 of this form.
- I designate the above for any benefits due after my death.
- I have attached a clear, legible copy of my photo ID.

Signature (handwritten)

Date