



**DESIGNATION OF BENEFICIARY (020)**  
 NORTH DAKOTA RETIREMENT AND INVESTMENT OFFICE  
 TEACHERS' FUND FOR RETIREMENT DIVISION  
 SFN 10341 (4-2016)

**Please see reverse side for instructions and important information on naming a beneficiary(ies) and death benefits available.** In compliance with the Federal Privacy Act of 1974, the disclosure of the individual's social security number on this form is mandatory pursuant to 26 U.S.C. § 3402. The individual's social security number is used for tax reporting and as an identification number.

Member Name (First, Middle, Last)		Person ID	Gender	Birth Date
Mailing Address (Street or Box)		City	State	ZIP Code
<input type="checkbox"/> Married <input type="checkbox"/> Single	Maiden Name	Spouse Name (First, Middle, Last)		Gender
Work Telephone Number	Home Telephone Number	E-mail Address		

Primary Beneficiary(ies)	Relationship	Social Security Number	Date of Birth	Gender	% Share	Address
<b>Total must equal</b>					<b>100%</b>	

Contingent Beneficiary (ies) (Optional)	Relationship	Social Security Number	Date of Birth	Gender	% Share	Address
<b>Total must equal</b>					<b>100%</b>	

<b>Spousal Consent</b>	
<p><b>If you are married and designate a beneficiary other than your spouse, your spouse must consent in writing to the alternate beneficiary (NDCC 15-39.1-17).</b></p> <p>I have read and understand the death benefit information on the reverse side. I consent to the above named beneficiary(ies) designated by the above named TFFR member.</p>	
Signature of Spouse	
Date	

<b>Member's Signature</b>	
<p>I have read and understand the death benefit information on the reverse side. I designate the above named beneficiary(ies) to my TFFR account.</p>	
Signature of Member	
Date	

**Return to:**  
 ND Retirement and Investment Office  
 1930 Burnt Boat Drive, PO Box 7100  
 Bismarck ND 58507-7100  
 www.nd.gov/rio

Telephone: 701-328-9885  
 Toll free: 800-952-2970  
 Fax: 701-328-9897

This form is available in an alternate format upon request.

## **Instructions for Completing Designation of Beneficiary Form:**

Please complete each section of this form (unless optional). If you need additional space to name multiple beneficiaries, attach a separate sheet. Sign the form and have your spouse sign the form if you are married and do not designate your spouse as beneficiary.

Your beneficiary designation is subject to the governing statutes and rules and regulations established by the Board of Trustees of the ND Teachers' Fund for Retirement (TFFR). The acceptance of this designation does not establish that a survivor benefit will be payable. Whether or not a benefit is payable and the amount thereof, will be determined at the time of death under laws and regulations then applicable.

**This designation of beneficiary revokes any prior form. Please keep your designation current by updating your beneficiary if you marry, divorce, have children, or if your spouse or other beneficiary dies.**

## **Naming a Primary Beneficiary**

TFFR members should designate a beneficiary(ies) in writing for the purpose of directing payment of a claim due to a member's death.

If you are married\*, you must name your spouse as beneficiary or provide written spousal approval to name an alternate beneficiary. If you are not married, or if you have written spousal consent, you can name any person (up to 10), organization, church, or charity as beneficiary of your retirement account. However, if more than one beneficiary is named, they are not eligible to receive a monthly annuity for life. Also, if more than one person is named as beneficiary, they will share equally in the survivor benefit unless specific percentages are designated. If specific percentages are designated, they must equal 100%.

If you do not designate a beneficiary, death benefits (if any) will be paid to your surviving spouse; if none, to your estate.

\*Same gender marriages are recognized as legal marriages in all states. Married same gender couples receive all the legal rights and benefits afforded to married opposite gender couples.

## **Naming a Contingent Beneficiary (Optional)**

Naming a contingent beneficiary(ies) is **optional**. This section should only be completed if you do not wish survivor benefits to be paid in the order provided by state law (surviving spouse, estate). Benefits will be paid to your contingent beneficiary only if your primary beneficiary is deceased.

## **Death Benefits**

If a member's death occurs prior to retirement, the beneficiary/survivor of a nonvested member (Tier 1 member—less than three years of service credit; Tier 2 member—less than five years of service credit) will be eligible for a refund of account value (member contributions plus interest). Survivors of vested members will be eligible for: 1) refund of account value; 2) monthly reduced annuity for life under 100% Joint and Survivor option (not available if more than one beneficiary is named).

If a member's death occurs after retirement, the death benefit your beneficiary/survivor receives (if any) is based on the plan you select at retirement.

**Additional beneficiary and death benefit information can be found in the TFFR Handbook on our website—  
[www.nd.gov/rio](http://www.nd.gov/rio).**

**If you have any questions, please contact the administrative office.**