

City of Waterbury



Pension and Benefits Office
236 Grand Street
Room 222
Waterbury, CT 06702
Phone 203-574-6844 Fax 203-346-2685

Important:
Read all instructions
before completing this form.

Designation of Beneficiary Waterbury Retirement System

A. Instructions

- Type or print in ink, initial any changes that you make, and do not use white out.
- Types of beneficiaries:
 - Primary - Person(s) to receive the benefits upon your death.
 - Contingent - Person(s) to receive the death benefits upon your death if the primary beneficiary(ies) is deceased
- If more than one beneficiary is made in either primary or contingent, be sure that the shares add up to 100%. Do not use dollar amounts to indicate the shares.
- You may change your beneficiary at any time, without the knowledge or consent of a previous beneficiary. If a court order applies, it is the designee's responsibility to produce a copy and provide it to the Pension office.
- A designation of beneficiary remains in effect until (1) you cancel it by filing a new designation or (2) you receive a refund of your retirement contributions.
- If you survive all the beneficiaries named, payment would be issued to your estate.

THIS BENEFICIARY FORM ONLY APPLIES TO PLANS ADMINISTERED BY THE WATERBURY RETIREMENT SYSTEM.

B. Identification

Name (Last, First, MI)	Date of Birth (mm/dd/yyyy)	Social Security Number
Street Address	Department	
City, State, Zip	Check if: New Enrollee <input type="checkbox"/> Change in election <input type="checkbox"/>	

C. Designation of Beneficiary(ies)

First Name, Middle Initial, and Last Name of each beneficiary	Relationship	Address	Type of Beneficiary	Percent
			PRIMARY	
			PRIMARY	
			PRIMARY	
				Designation must equal 100%
			CONTINGENT	
			CONTINGENT	
			CONTINGENT	
Date of Designation	Your Signature			Designation must equal 100%