

# Central Pennsylvania Teamsters Pension Fund

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TOLL FREE IN USA: 1-800-331-0420  
FAX: 610-320-9239

## CHECKLIST FOR COMPLETION OF BENEFICIARY FORMS

1. Did you complete Part A, Participant's information, listing your name, social security number, address and Employer?
2. After completing your beneficiary information under Part B, did you sign and date the form? If you are naming a spouse as primary beneficiary, the information must be completed.
3. Did you complete and sign Part C? If you checked either of the first two (2) boxes stating "I am lawfully married (includes separated but not legally divorced)", or "I am lawfully married under common law", all you need to do is sign Part C.
4. If under Part C you checked the box stating "I am not lawfully married (includes single, widowed and legally divorced)", did you complete and sign Part C and have Part C notarized?\* Please note that if you previously named your spouse as your beneficiary and are now divorced and wish to change your beneficiary, you must submit a photocopy of your divorce decree along with the completed beneficiary form.
5. If you named someone other than or in addition to your spouse as your primary beneficiary, under Part B, did you have your spouse complete and sign Part D and have this section notarized?\* If you named only your spouse as your primary beneficiary under Part B, you **DO NOT** have to complete Part D.

**\*the date of notarization must be the same as the date you sign the beneficiary form**

If you have any problems or questions regarding the completion of this form, please contact the Pension Fund Office. In Pennsylvania dial 610-320-5505 or our toll free WATS Line at 1-800-343-0136. If you live outside of the state of Pennsylvania, our nationwide toll free number is 1-800-331-0420.

## EXPLANATION OF PRIMARY OR CONTINGENT BENEFICIARY

Please indicate the name(s) of your primary beneficiary(ies); if you wish, please indicate the name(s) of your contingent beneficiary(ies). If you are married, please list your spouse as your primary beneficiary. You may name someone other than your spouse or someone in addition to your spouse as your primary beneficiary(ies) if your spouse consents by completing Part D.

Benefits payable under the Defined Benefit Plan and Retirement Income Plan of the Central Pennsylvania Teamsters Pension Fund Consolidated Fund Agreement as a result of your death will be paid to your primary beneficiary. If your primary beneficiary dies before you or dies before receiving the death benefit, then your remaining primary beneficiary, if any, will receive the remaining benefit; if no primary beneficiary survives you, your contingent beneficiary will receive the remaining benefit. Benefits will be paid in equal shares to the primary beneficiary (or contingent beneficiary) unless you designate otherwise on this form. If no beneficiary is designated or if none survive you, payments will be made in accordance with the plan documents.