



KPERS-7/99R Rev. 12/25

DESIGNATION OF BENEFICIARY – RETIRED

For security reasons, do not submit form by email.

■ **Important** – You have the option to make beneficiary changes in your online account at kspers.gov. *Changes online or with this form replace all previous designations.* Read instructions on page 2. If you have more beneficiaries than spaces in any category, please use an Additional Retirement Beneficiaries page. Do not attach plain paper or continue on the back of this form. Additional pages must be attached to this completed form to be valid.

☐ Mark this box if you are using additional pages.

■ **Contact Us** – toll free: 1-888-275-5737 • phone: 785-296-6166 • fax: 785-296-6638
email: kpers@kspers.gov • web site: kspers.gov • mail: 611 S. Kansas Ave., Suite 100, Topeka, KS 66603

■ Part A – Member Information

1. Social Security Number: _____ 2. Name (First, MI, Last): _____
3. Telephone Number: _____ 4. Mailing Address: _____
City, State, Zip: _____

■ **Part B – Primary Beneficiary for KPERS Retirement Benefits** – Includes accumulated contributions and interest. Each beneficiary will share your benefits equally. *You must name a primary beneficiary in this section.*

Name: _____ Social Security Number: _____
☐ Person (state relationship): _____ ☐ Estate ☐ Trust Date of Birth: _____
Name: _____ Social Security Number: _____
☐ Person (state relationship): _____ ☐ Estate ☐ Trust Date of Birth: _____
Name: _____ Social Security Number: _____
☐ Person (state relationship): _____ ☐ Estate ☐ Trust Date of Birth: _____

■ **Part C – Contingent Beneficiary for KPERS Retirement Benefits** – Includes accumulated contributions and interest. Each beneficiary will share your benefit equally if your primary beneficiary(ies) is not living.

Name: _____ Social Security Number: _____
☐ Person (state relationship): _____ ☐ Estate ☐ Trust Date of Birth: _____
Name: _____ Social Security Number: _____
☐ Person (state relationship): _____ ☐ Estate ☐ Trust Date of Birth: _____
Name: _____ Social Security Number: _____
☐ Person (state relationship): _____ ☐ Estate ☐ Trust Date of Birth: _____

■ **Part D – Optional Funeral Establishment Designation** – If you name a funeral establishment to receive your \$6,000 death benefit, you also need to name a primary beneficiary to receive any other benefits.

1. Funeral Establishment: _____
2. Mailing Address: _____ 3. City, State, Zip: _____

■ **Part E – Member Signature** – Only the member may designate a beneficiary. Conservators, guardians and those with power of attorney cannot name a KPERS beneficiary. Member's signature must be witnessed by a disinterested party. Witness may not be a beneficiary. If a funeral establishment is named, employees of the establishment may not witness signature.

Member Signature: _____ Month/Day/Year: ____/____/____
Witness Signature: _____ Month/Day/Year: ____/____/____
Print Witness Name: _____ Telephone Number: _____

Information About Naming a Beneficiary

■ Important

- You must name a primary beneficiary for retirement benefits. If you don't have a beneficiary, your benefits will be paid by the line of descendants in K.S.A. 74-4902(7).
- If you have more than one beneficiary (primary or contingent), each will share the benefits equally.

■ Who Can You Name as Beneficiary?

- A living person
- A trust
- Your estate
- Any combination of these options

You cannot name a church or other charitable organization as a beneficiary.

■ Naming a Trust or Your Estate

- If you name a trust, provide the name of the trust (e.g., Your Name, Trust #1).
- If you name your estate, write "Estate of (Your Name)" or "My Estate."
- You can name other primary or contingent beneficiaries in addition to a trust or estate.

■ Naming a Minor Child as Beneficiary

- The Retirement System pays lump-sum benefit amounts under \$25,000 based on the Kansas Uniform Transfer to Minors Act. KPERS will send the guardian or custodian a form to receive the benefit on the minor's behalf.
- If the benefit is \$25,000 or more, Kansas law requires an appointed conservator.

■ Especially For Retired Members

- All retirees have a \$6,000 death benefit. Your beneficiaries receive the \$6,000 death benefit and any remaining contributions and interest.
- If you chose a 5-, 10- or 15-year Life-Certain payment option, your beneficiary will receive your monthly benefit for the rest of the guaranteed period.
- The \$6,000 death benefit can be paid to a funeral establishment. If you name a funeral establishment for the \$6,000 death benefit, you also need to name a primary beneficiary to receive any other benefits.

■ Membership in Multiple Plans (KPERS, KP&F, Judges and Board of Regents)

- This beneficiary designation will become effective for all systems.
- For Board of Regents members with KPERS service credit, this form designates beneficiaries for KPERS benefits only.