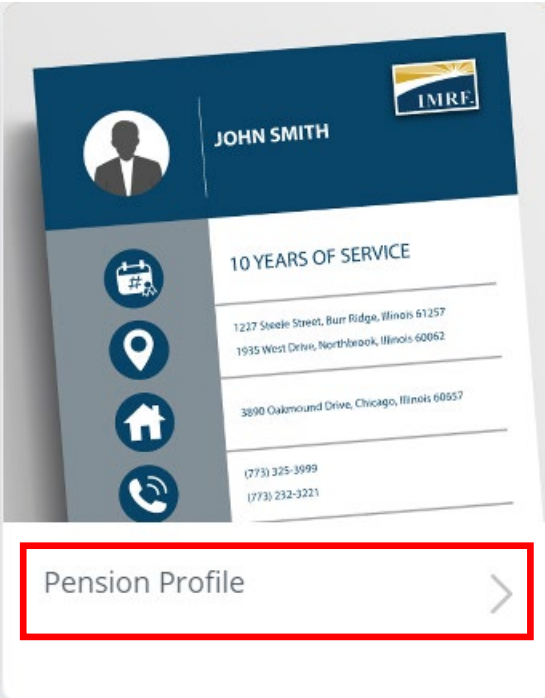



Member Portal – How to Add/Change Beneficiary



Locally funded, financially sound.



Image	Description
	Click on Pension Profile widget.
	Click the Survivor(s) Information link on the left side of the page.

My Beneficiary Information

Primary Beneficiary(ies)

Designated Beneficiary ⓘ

Contact Information

Allocation ⓘ

Spouse

Email Address
Not on file
Mobile Phone Number

100.00%

Secondary ⓘ

Designated Beneficiary ⓘ

Contact Information

Allocation ⓘ

Child

Not on file
Email Address
Not on file
Mobile Phone Number

100.00%

Update

Scroll to the middle of the page and click the blue Update Button at the bottom of the "My Beneficiary Information" chart.

Update

Please validate or complete the following information.

Split percentage equally ⓘ Secondary ⓘ

REG

Designated beneficiary(ies)

Primary

Secondary (optional)

Spouse
Update Remove

100.00%

0.00%

Child
Update Remove

0.00%

100.00%

+ Add a beneficiary

Total

100.00%

100.00%

To remove a beneficiary, click the Remove link under their name.

To add a beneficiary, click the Blue Add a beneficiary button.

To split shares equally, click on the Split percentages equally slider.

Make sure the secondary slider is on so secondary beneficiaries can be added.



Add a beneficiary

Select the type of beneficiary

- Person
- Estate
- Organization

Cancel

Next

Select whether your new beneficiary is a person, estate or organization and click the Next button.

Please note: If you are naming a trust, select "Organization," then click "Next" to enter additional information about your trust. Upon your death, IMRF will need the named trust to provide us a copy of your full trust document.

Add a beneficiary



First name

Last name

Social Security Number (optional, 9 digits) 

Not on file [Add](#)

Relationship to you

Select a relationship...



Email address (optional)

Mobile Phone Number (optional)

Cancel

Add

Enter your beneficiary's name and relationship then click the Add button.



Child
[Remove](#)



Equally shared



Equally shared

[Add a beneficiary](#)

Total	100.00%	100.00%
--------------	----------------	----------------

 **About the beneficiary designation** 

Regardless of your beneficiary designation, if at the moment of your death, you have a spouse who qualifies under the definition of eligible spouse, the pension plan and/or application pension legislation may require that certain survivor benefits be paid first to your spouse (unless your spouse has waived the benefit in writing) and that any benefits not payable to your spouse will be paid to your beneficiary or beneficiaries.

Cancel

Next

Enter percentage or split shares equally then click the blue Next button.

Child

Email address
Not on file

Equally
shared

Mobile phone
number
Not on file

The allocation by beneficiary is 50.00%.

Certification

I, [redacted], understand that designating a new beneficiary or changing information relating to an existing beneficiary in this electronic format will permanently override and cancel my previous beneficiary designation, if any.

No paper forms or handwritten signatures will be required. It is my sole responsibility to ensure that this designation reflects my wishes and I am advised to consider obtaining professional legal or financial advice in making this decision.

I acknowledge that, regardless of my beneficiary designation, the pension plan and/or applicable pension legislation may require that certain survivor benefits be paid first to my spouse (unless my spouse has waived the benefit in writing), and that any benefits not payable to my spouse will be paid to my beneficiary or beneficiaries.

Previous

Confirm

Review your change and click the confirm button.