



# Oklahoma City Employee Retirement System (OCERS)

## Beneficiary Designation Form

### Lump-Sum Death Benefit

As a member of the Oklahoma City Employee Retirement System (OCERS), you are required to make contributions. Your contributions are tax-deferred and are not taxable until you terminate your employment and elect to receive the proceeds either as a monthly retirement benefit, if eligible, or a lump sum payment. Under the provisions of the Oklahoma City Municipal Code, it is mandatory that you designate a beneficiary.

As an active employee or if you separate service but have not started to receive your monthly pension benefit, your contributions (all or a portion) may be payable in a lump sum. As a retiree, a single lump-sum payment of \$5,000 may be payable.

You may change or cancel your beneficiary designation at any time. If you name a spouse as the beneficiary and then divorce, the former spouse must be designated as a beneficiary after the divorce to receive a benefit. Please complete and return this form by mail: OCERS, 420 W Main, Suite 343, Oklahoma City, OK 73102, email [Retirement@okc.gov](mailto:Retirement@okc.gov) or fax 405-297-2216.

### Beneficiary Designation

Name			Relationship	<input type="checkbox"/> Primary <input type="checkbox"/> Contingent
Address	City, State	Zip	Date of Birth	_____ %
Name			Relationship	<input type="checkbox"/> Primary <input type="checkbox"/> Contingent
Address	City, State	Zip	Date of Birth	_____ %
Name			Relationship	<input type="checkbox"/> Primary <input type="checkbox"/> Contingent
Address	City, State	Zip	Date of Birth	_____ %

***\*If the primary or contingent beneficiary is a minor, you must nominate a custodian for the minor. You may designate one or more substitute custodians for a minor beneficiary on a separate form provided by OCERS.***

I hereby nominate as custodian for \_\_\_\_\_ (insert name of minor) under the Oklahoma Uniform Transfers to Minors Act. Custodian cannot be an eligible primary beneficiary if minor is listed as a Contingent.

Name			Relationship to Minor
Address	City, State	Zip	Date of Birth

In the event that the above designated primary beneficiary has predeceased me or has been divorced from me prior to my death, and not renominated as a beneficiary after the date of divorce, the contingent beneficiary will receive any eligible contributions or any payable benefit under the provisions of the Oklahoma City Employee Retirement System.

Printed Name	Person Number or last 4 of SSN
Employee / Retiree Signature	Date