

## Beneficiary Designation and Spousal Waiver

This beneficiary designation is effective upon receipt by Minnesota State Retirement System (MSRS) and supercedes all prior designations.

### 1. Information about you

Last name	First name	MI	Account ID or SSN
Mailing address			
City		State	Zip code
Spouse's name		Spouse's date of birth	

Check one.

- As provided by law (See back for explanation)
- To designated specific beneficiaries (Complete 2 & 3)  
If married, surviving spouse benefit supercedes this designation unless a spousal waiver is signed. (see back for explanation)

### 2. Primary beneficiary

If you name more than one person, they share equally.

Name of primary beneficiary	Relationship	Address	Date of birth

### 3. Contingent beneficiary

If none of the above are living, payment will be made to your contingent beneficiary. If you name more than one person, they share equally.

Name of contingent beneficiary	Relationship	Address	Date of birth

### 4. Required signature

I designate those above as my beneficiaries.

Participant Signature \_\_\_\_\_ Date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
Month Day Year

## 5. Spousal waiver

---

If you have credit for at least three years of service, your surviving spouse will receive a 100 percent Joint and Survivor benefit for their life or may choose to receive a refund of your contributions plus interest. This applies regardless of any beneficiary designation you have made. You may waive this law by signing below in the presence of a notary. Your spouse must also sign in the presence of a notary.

I request that the above provision of the law not apply to my spouse. If there are no minor children, a lump-sum payment should be made only to an otherwise designated beneficiary.

## 6. Spouse's signature for spousal waiver

---

Spouse's signature \_\_\_\_\_ Date \_\_\_\_\_

Subscribed before me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Notary Stamp

County of \_\_\_\_\_

State of \_\_\_\_\_

Notary public's signature \_\_\_\_\_

## 7. Participant's signature for spousal waiver

---

Participant's signature \_\_\_\_\_ Date \_\_\_\_\_

Subscribed before me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Notary Stamp

County of \_\_\_\_\_

State of \_\_\_\_\_

Notary public's signature \_\_\_\_\_

## 8. As provided by law

---

### General and Correctional Plans

If no beneficiary has been designated, or if the designated beneficiary is deceased, any money payable from the Minnesota State Retirement System must be paid in accordance with retirement law, M.S. 352, "to my surviving spouse; or if none, to my surviving children in equal shares; or if none, to my surviving parents in equal shares; or if none, to the representative of my estate."

If an employee has credit for at least three years allowable service and dies before a retirement or disability benefit has become payable, regardless of any designation of beneficiary, the surviving spouse of the employee may elect to receive a refund of the contributions plus interest or the 100 percent Joint and Survivor benefit which the employee could have qualified for on the date of death.

You may waive this law by signing the spousal waiver above, requiring the notarized signatures of you and your spouse.

### Unclassified Plan

At any time after your death, your spouse may receive a lump-sum payment of the value of the member's account, a lump-sum of a portion of the member's account and a lifetime benefit based on the remaining value of the account, or a lifetime benefit based on the full value of the account. Your spouse is entitled to their benefit regardless of any designation of beneficiary made by the employee.

You may waive this law by signing the spousal waiver above, requiring the notarized signatures of you and your spouse.

If there is no surviving spouse, a lump-sum payment of the value of the account is paid to the designated beneficiary. If no beneficiary is named, the account is paid to the member's children in equal shares; if no children, to the member's parents in equal shares; if no parents, to the representative of my estate.