

# UFCW Local One Benefit Funds

## BENEFICIARY FORM

### Retiree/Disability Life Insurance

MEMBERS NAME: \_\_\_\_\_

MEMBERS SOC. SEC. # \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

*The UFCW Local One Health Care Plan is hereby notified that my beneficiary(s) shall be:*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Signature of Member

\_\_\_\_\_  
Date

*(This beneficiary form MUST be witnessed by someone other than the beneficiary or relative)*

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Date

**(Return to: UFCW Local One Benefit Funds - 5911 Airport Road - Oriskany NY 13424)**

### HOW BENEFICIARIES SHOULD BE NAMED

Always show the full name of the beneficiary, for example: Mary T. Doe NOT Mrs. John Doe. Also include the address, phone number and relationship to beneficiary(s). The following are examples of the standard wording for beneficiary designations most commonly used where the Death Benefit is to be payable in a single sum:

1. One Beneficiary - Mary T. Doe, Spouse (include address and phone, if available).
2. Two Beneficiaries - In equal shares to my children, John Doe and Jane Doe, if living at my death or to the survivor of them.
3. Three Beneficiaries - In equal shares to my mother, Ruth Doe, and my aunts, Edna Jones and Ann Brown, if living at my death or to such of them as shall then be living.
4. Unnamed Children - In equal shares to my children if living at my death or to such of them as shall be living. (Please note: Children under the age of 1 cannot collect benefit until they reach the legal age of 18.)
5. Successive Beneficiaries - My spouse, John L. Smith, if living at my death; or not then living, in equal shares to my children if then living or to such of them as shall be then living.
6. Estate - My executors or administrators.
7. Trustee - The filing with the insurance carrier or the Fund of a copy of the trust agreement is not required. It is understood and agreed that the Fund will not be responsible for any failure of a trustee to perform the duties of trustee nor for the application or disposition of any money paid to a trustee and such payment will fully discharge the Fund of the amount so paid.
8. Funeral Home - You can designate payment directly to the funeral home, IF you have on file with the funeral home an Assignment Form, filled out and signed.