



Instruction Sheet for Designation of Beneficiary

TRS677 (09-16)

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- YOU MUST USE THE CORRECT TRS FORM. THE TRS FORM MUST INCLUDE AN ORIGINAL SIGNATURE. TRS RECOMMENDS THAT YOU SIGN IN INK AND USE A COLOR OTHER THAN BLACK. PLEASE TYPE OR PRINT YOUR DESIGNATION LEGIBLY.
- If you are physically unable to sign your name, you may instead make a mark on the signature line in the presence of a disinterested witness or a notary. The disinterested witness or notary who witnesses your mark should make a statement near your mark that you intended the mark to be your signature, include his or her name, and sign the statement.
- If you are unable to sign your name or make a mark, you may:
 - Ask a disinterested witness to sign for you. The disinterested witness who signs for you should make a statement near the signature that assistance was requested, include his or her name, and sign the statement.
 - Ask a notary to sign for you in the presence of a disinterested witness. The notary who signs for you should make a statement near the signature that assistance was requested, that the notary signed in the presence of a disinterested witness, and include the name of the disinterested witness.
- TRS must receive a TRS beneficiary form before your death for the beneficiary designation to be effective. Your employer is not authorized to receive the form instead of TRS; do not leave this form with your employer.
- Please provide enough information for TRS to identify you, and to identify and locate your beneficiary after your death (i.e.: your full name and social security number).
- Initial any corrections, mark-outs, or white-outs made on the form to avoid possible disputes. TRS will not accept stipulations or instructions you write on the form for the payment or division of benefits; TRS will pay benefits according to applicable law. No attachments may be made to the form.
- If you designate more than one beneficiary, the surviving beneficiaries will share equally in any applicable benefits payable (share and share alike). This means that if one designated beneficiary dies before you die, then any remaining surviving beneficiaries will receive equal shares of the benefits. Do not stipulate unequal portions to joint beneficiaries.
- If you do not designate a primary beneficiary but you designate an alternate beneficiary, the alternate beneficiary will receive any benefits payable.
- A blank designation of beneficiary on a TRS form that is signed by you revokes any previous designation for the applicable benefits and leaves no designation of beneficiary. When no beneficiary is designated, applicable TRS plan terms determine who will receive benefits after your death. When TRS receives a new beneficiary designation form, it revokes any previous designation for the benefits affected by the form. To add or remove a designated beneficiary, you must complete the new applicable form in its entirety and send it to TRS.
- If you designate a minor, any benefits will be paid to the surviving parent or the court-appointed adult responsible for the minor based on the laws in the minor's state of residence.
- If you wish to have any benefits paid to your estate, designate "my estate" as beneficiary. Your estate can be named as either primary or alternate beneficiary. Your estate must be probated in some manner for TRS to pay benefits to your estate. Naming your estate may delay payment of benefits while the required documents are obtained from the court.
- A divorce will revoke your former spouse as beneficiary for some TRS benefits payable after your death if you designated that person as your beneficiary before the date of your divorce and if TRS receives a certified copy of your divorce decree before paying benefits. If you wish to designate your former spouse as beneficiary, complete a new beneficiary form after the date of the divorce and send it to TRS. Receipt by TRS of a divorce decree does not affect the beneficiary for an Option 1, 2, 3, 4, or 5 retirement payment plan, a remaining partial lump sum option (PLSO) balance, or a remaining deferred retirement option plan (DROP) balance.
- If you die before you receive all of your DROP or PLSO payments, any remaining DROP or PLSO balance will be distributed in the following order: (1) to the beneficiary designated on the "Designation of Beneficiary for Deferred Retirement Option Plan (DROP) Benefits" (form TRS 11D) or the "Designation of Beneficiary for Partial Lump-Sum Payment(s)" (form TRS 12L), as applicable; (2) to the beneficiary designated to receive your retirement benefits; then, (3) to the beneficiary eligible to receive active member death and retiree survivor benefits.

If you have questions or circumstances not covered by these instructions, please contact TRS.