



## Acceptance of Designation of Beneficiary Form

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Member Records

### Responsible Executive:

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### Policy Review:

Last reviewed: N/A  
Last Distributed: N/A  
Next review: (Date of next review, if required)

### I. Purpose of Policy

Acceptance of Designation of beneficiary form policy was written to identify the validity of the designation form. Once the designation is review the member will be notified of the validity of the designation form. This policy have this policy the fund assures to have a valid designation on file for members.

### II. Definitions

Definitions are used to define terms that are related to the policy or unique language. Improves understanding/context; user can refer back to the definition as needed. Do not over format. This will be done in the final process. Examples:

**Policy** – CTPF will only accept designation of beneficiary forms that completed correctly.

**Procedure** – A series of steps to be followed or actions to be taken in order to accomplish a particular task in a given way.

**Procedure** – All designation received in office are date stamped and reviewed to ensure members have

correct designation of beneficiary form on file and to inform members when a designation is incorrect.

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### **III. Scope**

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#### **Who must follow; where and when applied.**

The member is responsible for keeping an updated designation on file. The fund is responsible for reviewing the designation of beneficiary form and informing the member of the validity of the form. A letter is sent informing the member the form was incomplete. A designation of beneficiary form must be received in office before the date of death. The received date on the designation form must be before the DOD of the member for the form to be valid if filled out correctly in order for it to be used to pay benefits.

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### **IV. Policy**

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CTPF will only accept designation of beneficiary forms that are completed correctly.

A designation of beneficiary must be properly notarized in order for the designation form to be accepted.

In the case where a designation was not filled out correctly a member will be notified. CTPF will provide written notice to the member if the Designation of Beneficiary Form is rejected.

A member will be notified if a designation was not accepted by sending a letter enclosed with a new designation of beneficiary form. The letter notifying the member will list what section and why it was not accepted.

CTPF must receive a properly executed designation of beneficiary prior to the date of death of the member.

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### **V. Exceptions**

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Designation of beneficiary forms that were received and accept by CTPF and were not properly completed will also be rejected.

In a case where we have more than one designation on file CTPF will use the newest designation on file if completed correctly.

If the newest designation on file isn't properly fill out CTPF will use the next designation on file.

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### **VI. Background**

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This policy protects the fund from paying a death benefit to the wrong beneficiary. By ensuring we have a valid designation of beneficiary on file we ensure that we will

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**VII. Legislation/Regulation:**

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Typically, Federal and State laws that inform/dictate the policy. Specific reference.

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**VIII. Procedure**

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Procedures for the Acceptance of Designation of Beneficiary form.

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**IX. Resources**

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This section is required for anything referred to in the policy. Links to forms, tools, and processes used to implement or required for compliance with the policy; provides background material that is helpful and not directly related to policy implementation. Resources are meant as supplemental information, and they should not be relied upon to convey significant policy information. By maintaining resources separately, the owner/department can more easily maintain the information when it needs to be changed or updated.

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**X. Related Policies**

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Release of Designation of Beneficiary Form policy  
Signing of Designation of Beneficiary Forms

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**XI. Mandatory Reporting**

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Process to follow in case of policy violation.

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**XII. Policy Administration**

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Note if there is a review cycle for this policy; dates should be in category "Policy Review" at top of form.

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**XIII. Approval**

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Signature:

Date:

Title: (Type in title)

Signature:

Date:

Title: (type in title)

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**XIV. Modification History**

Modification:	Date:
Modification:	Date:
Modification:	Date:

List each issue, revision, edit, or review date in chronological order. Note in this section when the policy name or number changes. Note Board of Trustee action date, if board action was taken. Note if a revision date is exclusively for the policy section or the procedure section. *Revised*: Date of substantive content changes approved by the College Policy Process. *Edited*: Date of style, format or grammar changes and/or correction of error. No approval is needed through the formal review and approval process.

These two are at the top of the form - *Issued*: First release date of the policy. *Reviewed*: Last date that the policy content was reviewed and found to be current, e.g. no changes were made.