



Releasing of Designation of Beneficiary Form

I. Purpose of Policy

1. Releasing of Designation of Beneficiary form (“form”) was created to protect the Member.
2. Prevent the form from being altered or changed by someone other than the member.

II. Scope

Member Records Department is responsible for all designations forms. If there is a problem with a Designation of Beneficiary form and Member Records is unsure of how to handle it, member records team will contact the Chief Legal Officer or designee for assistance.

III. Policy

The Fund will not release the content or a copy of the Designation of Beneficiary form to anyone other than the Member, except as required by law.

If the Fund receives an incomplete form or a form that was not properly executed, the Fund will send a new form to the Member for completion, with an explanation.

I. Procedure

Procedure- Releasing Designation of Beneficiary form.

II. Resources

The Procedure for the policy is located in the Member Records folder.

III. Related Policies

N/A

VIII. Approval

Signature:

Date:

Title: (Type in title)

Signature:

Date:

Title: (type in title)

IX. Modification History

Modification:

Date:

Modification:

Date:

Modification:

Date:
