

# Standard Insurance Company

CTA Benefits and Services  
 PO Box 4744 Portland OR 97208  
 Tel & TTY 800.522.0406 Fax 888.414.0393

## Beneficiary Designation/Change for CTA-Endorsed Plans

**For additional information and forms go to: [www.CTAMemberBenefits.org/TheStandard](http://www.CTAMemberBenefits.org/TheStandard)**

PARTICIPANT ID	POLICY NO.	SCHOOL DISTRICT <i>Please do not abbreviate.</i>			
FIRST NAME	MIDDLE INITIAL	LAST NAME		PRIMARY PHONE NUMBER	
ADDRESS	CITY		STATE	ZIP	DATE OF BIRTH

Unless otherwise specified on a separate sheet of paper, this designation applies to coverage available through your CTA Voluntary Plans, if any, including Disability Insurance Survivors Benefit, Accidental Death and Dismemberment (AD&D) Insurance associated with Disability Insurance, Life Insurance, and Accidental Death and Dismemberment (AD&D) Insurance associated with your Life Insurance. Designations are not valid unless signed, dated and delivered to The Standard at the address above during your lifetime. **See page 2 for further information.**

### Primary Beneficiary Information \* Required fields.

FULL NAME*	DATE OF BIRTH*	ADDRESS	SOCIAL SECURITY NO.	RELATIONSHIP*	% OF BENEFIT*
TOTAL					100%

### Contingent Beneficiary Information \* Required fields.

FULL NAME*	DATE OF BIRTH*	ADDRESS	SOCIAL SECURITY NO.	RELATIONSHIP*	% OF BENEFIT*
TOTAL					100%

### Signature Required

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Electronic Signature**  I Agree By clicking the box marked "I Agree," I acknowledge that I am signing this document electronically. I understand that this electronic signature shall be enforceable under applicable state or federal law and is equivalent to a manual signature.

## BENEFICIARY INFORMATION

- Your designation revokes all prior designations.
- **Primary Beneficiary Definition:** The party designated to receive the proceeds of a life insurance policy following the death of the insured. Also known as first Beneficiary.
- **Contingent Beneficiary Definition:** The party designated to receive the proceeds of a life insurance policy following the insured’s death if the primary Beneficiary predeceased the insured. Also known as secondary Beneficiary and successor Beneficiary.
- If you name two or more Beneficiaries in a class (primary or contingent), two or more surviving Beneficiaries will share equally, unless you provide for unequal shares. If you complete the “% of Benefit” box(es), the amounts should add up to 100% for each class (primary or contingent).
- Benefits are payable to a contingent Beneficiary only if you are not survived by one or more primary Beneficiaries.

**Examples:**

FULL NAME*	DATE OF BIRTH*	ADDRESS	SOCIAL SECURITY NO.	RELATIONSHIP*	% OF BENEFIT*
Primary* <b>Jane Doe</b>	<b>1/1/68</b>	<b>123 Anywhere St.</b>	<b>XXX-XX-XXXX</b>	<b>Spouse</b>	<b>50%</b>
Primary <b>Jim Doe</b>	<b>5/23/72</b>	<b>62 Somewhere St.</b>	<b>XXX-XX-XXXX</b>	<b>Brother</b>	<b>50%</b>

FULL NAME*	DATE OF BIRTH*	ADDRESS	SOCIAL SECURITY NO.	RELATIONSHIP*	% OF BENEFIT*
Contingent <b>Sally Doe</b>	<b>7/6/93</b>	<b>123 Anywhere St.</b>	<b>XXX-XX-XXXX</b>	<b>Child</b>	<b>100%</b>

- If a minor (a person not of legal age) or your estate is the Beneficiary, it may be necessary to have a guardian or a legal representative appointed by the court before any death benefit can be paid. If the Beneficiary is a trust or trustee, the written trust must be identified in the Beneficiary designation.

**Examples:**

FULL NAME*	DATE OF BIRTH*	ADDRESS	SOCIAL SECURITY NO.	RELATIONSHIP*	% OF BENEFIT*
Primary <b>Jane Doe</b>	<b>1/1/68</b>	<b>123 Anywhere St.</b>	<b>XXX-XX-XXXX</b>	<b>Spouse</b>	<b>100%</b>

FULL NAME*	DATE OF BIRTH*	ADDRESS	SOCIAL SECURITY NO.	RELATIONSHIP*	% OF BENEFIT*
Contingent <b>Doe Family Trust</b>	<b>N/A</b>	<b>123 Anywhere St.</b>	<b>N/A</b>	<b>N/A</b>	<b>100%</b>

- A power of attorney must grant specific authority, by the terms of the document or applicable law, to make or change a Beneficiary designation. If you have questions, consult your legal advisor.
- Dependents Insurance, if any, is payable to you, if living, or as provided under the Group Policy.
- If you currently have a Beneficiary designation on file with your plan administrator for Life coverage under Standard’s Group Policy, that designation will also apply to any approved Additional/Optional Life, or other coverage increase. If you have no Beneficiary designation on file or wish to change the name of a current designee, submit the completed form to The Standard. If you do not name a Beneficiary or if you are not survived by one, benefits will be paid in equal shares to the first surviving class as defined by the Group Policy.
- Please Note: The Standard may not advise you on how to designate Beneficiary(ies). If you need assistance with completing this form, please contact The Standard at 800.522.0406.