



CHANGE OF BENEFICIARY AFTER RETIREMENT

Tennessee Consolidated Retirement System
Tennessee Department of Treasury

502 Deaderick Street • Nashville, TN 37243-0201 • 800.922.7772 • RetireReadyTN.gov



Please complete this form if you are currently drawing a pension and would like to change your beneficiary(s) on file with the Tennessee Consolidated Retirement System (TCRS).

SECTION 1. MEMBER INFORMATION

Member ID			Date of Birth		
Full Name					
Mailing Address					
City		State		Zip Code	
Email			Phone Number		

SECTION 2. NAMING NEW BENEFICIARY

A retiree may designate one or more persons(s) to serve as beneficiaries. A “person” means any individual, firm, organization, partnership, association, corporation, estate or trust.

- Member Only Plan: A retiree under the Regular Maximum/Member Only Plan may change his/her beneficiary(s) at any time, except whereby restricted by court order.
- Survivorship Plan: A retiree under Options 1-4 may make a one-time beneficiary change election for any reason, except whereby restricted by court order. If this change is requested after 60 days of the latter of the date of retirement or the retiree's Notice of Retirement Letter, the retiree's benefit will not be recalculated as a result of this change, nor will the new beneficiary be entitled to monthly benefits at the retiree's death. The new beneficiary(s) will only be entitled to any excess contributions remaining in the retiree's account at the time of retiree's death.
- Divorce: A retiree may change his/her beneficiary provided that such cancellation does not conflict with the final divorce decree or marital dissolution agreement. A retiree who desires to change his/her beneficiary (s) due to divorce must furnish the final decree and marital dissolution agreement. The retiree's benefit will not be recalculated as a result of this change, nor will the new beneficiary be entitled to monthly benefits at the retiree's death.
- Death: A retiree may change his or her beneficiary upon the death of the beneficiary by providing TCRS a copy of the death certificate. For optional retirement plans one (1) or two (2), the new beneficiary(s) will only be entitled to any excess contributions remaining in the retiree's account at the time of the retiree's death. If a member selected optional retirement plan three (3) or optional retirement plan four (4) at retirement, the retiree should provide TCRS a copy of the death certificate. Under either of those options, the retiree's benefit will be adjusted as a result of the death of the beneficiary. Any new beneficiary(s) will not be entitled to monthly benefits at the retiree's death. The new beneficiary(s) will only be entitled to any excess contributions remaining in the retiree's account at the time of retiree's death.

If TCRS discovers a change of beneficiary violates a court order, TCRS may deny or reverse your updated beneficiary election.

I request the Tennessee Consolidated Retirement System to pay any benefits due to me in the event of my death to the beneficiary(s) designated below.

Divorce: Is this change of beneficiary related to a divorce? Yes No

If you marked yes to this question, you must provide a copy of the divorce decree and martial dissolution agreement.

Death: Is this change of beneficiary related to a death? Yes No

If you marked yes to this question, please provide a copy of the death certificate.

Beneficiary #1

Full Name

Mailing Address

City

State

Zip Code

Beneficiary's Date of Birth

Beneficiary's SSN

Relationship to TCRS Member

Gender Male Female

Beneficiary #2

Full Name

Mailing Address

City

State

Zip Code

Beneficiary's Date of Birth

Beneficiary's SSN

Relationship to TCRS Member

Gender Male Female

Beneficiary #3

Full Name

Mailing Address

City

State

Zip Code

Beneficiary's Date of Birth

Beneficiary's SSN

Relationship to TCRS Member

Gender Male Female

Member's Signature

Date