OREGON PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

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PERS Tier One/Tier Two Beneficiary Restrictions Due to Divorce or Dissolution of Registered Domestic Partnership

This form is strictly for Tier One/Tier Two member beneficiary restrictions when there was either a Separate Account Award or No Award of Tier One/Tier Two benefits.

Section A: Member and former spouse/Registered Domestic Partner (RDP)/alternate payee (AP) information

Member name	PERS ID (optional)
Former spouse/RDP/AP name	

Any Tier One/Tier Two beneficiary restrictions are to be indicated below by checking the boxes that apply.

Section B: Non-retired member

☐ Member is required to designate the former spouse/RDP/AP as the sole primary **pre-retirement** beneficiary.

☐ Member is required to designate the former spouse/RDP/AP as a primary **pre-retirement** beneficiary for________%.

☐ Member is required to name any minor children as primary **pre-retirement** beneficiaries.

The requirement to designate minor children automatically expires upon minors reaching the age of majority.

☐ **At retirement** the member is required to elect a survivorship option and name the former spouse/RDP/AP as primary beneficiary.

☐ The former spouse/RDP/AP will be the sole survivorship beneficiary.

☐ The AP/former RDP will be the primary beneficiary for ________% of the survivorship benefit. (**This cannot be selected in cases of No Award**. A survivorship beneficiary benefit can only be divided when an AP/former RDP has received an award.)

Is the member required to elect a specific survivorship benefit option?

☐ Yes ☐ No If yes, which option? ____.

Section C: Retired member with survivorship increase option and former spouse as beneficiary

Retirees who elected a survivorship increase option at retirement and designated their spouse as beneficiary are eligible to "pop up" to the higher paying Option 1 when the marriage is dissolved unless restricted by court order.

If the retiree elected option 2A, L2A, 3A, or L3A, is the retiree <u>**restricted**</u> from popping up to the Option 1 benefit?

☐ Yes **(The retiree is allowed to pop up unless this box is checked.)**

If the retiree is restricted from popping up or the retiree does not request a pop up due to divorce, the former spouse/RDP will remain the beneficiary. A legal separation or dissolution of a registered domestic partnership does not qualify and is automatically restricted from pop up regardless of whether the "Yes" box is unchecked.

Section D: Retiree with non-survivorship option (Refund Annuity, 15 Year Certain, Lump-sum installments)

☐ Retiree is allowed to update **retirement** beneficiary designation without obtaining consent of former spouse/RDP.

☐ Retiree is required to designate the former spouse/RDP as the sole primary **retirement** beneficiary.

☐ Retiree is required to designate the former spouse/RDP as a primary **retirement** beneficiary for______________%.

☐ Retiree is required to name any minor children as primary **retirement** beneficiaries.

The requirement to designate minor children automatically expires upon minors reaching the age of majority.

In compliance with the Americans with Disabilities Act, PERS will provide help filling out this form upon request. You may request help by calling **toll free 888-320-7377** or **TTY 503-603-7766.**