



Kentucky Retirement Systems

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Form 2035
Revised 03/2009

Beneficiary Designation

Important Notice

This form is not valid unless it is completed correctly and received in the retirement office prior to the member's death. You must sign this form and a witness must sign this form or it will be not be acceptable. Please complete this section and the back of this form. This is a legal and binding document and is not to be altered.

Member Information

Member Name:		Member ID:	
Address:	City:	State:	Zip Code:
Date of Birth:	Work Phone:	Home Phone:	

Instructions for Completing Your Form 2035

- You may name one or more individuals, your estate, or a trust or trustee as principal or contingent beneficiary of your retirement account. The principal beneficiary will receive benefits in the event of your death. The contingent beneficiary will receive benefits in the event of your death only if all of the named principal beneficiaries are deceased.
- Naming One or More Individuals As Beneficiary: If you name *more than one individual* as principal or contingent beneficiary you may indicate the percentage each beneficiary is to receive. Percentages for the principal beneficiary section must equal but not exceed 100%. Percentages for the contingent beneficiary section must also equal but not exceed 100%. If you do not indicate percentages, disbursement of payment will be divided equally among living principal beneficiaries, or if all principal beneficiaries have died, among all living contingent beneficiaries, as provided in KRS 61.542.

If you name a *single individual* as beneficiary, that individual may be eligible for a lifetime benefit upon your death, depending on your total service credit. If you name multiple individuals, your estate or a trust, no lifetime benefit is available.

If you name a single individual as the principal beneficiary who is *your spouse* and you become legally divorced, the principal beneficiary designation is void and the contingent will become the beneficiary. In order to retain your former spouse as principal beneficiary, you must re-designate that individual after the effective date of the divorce.

- Naming An Estate As Beneficiary: You may name your estate as either principal or contingent beneficiary by writing "My Estate" as the name of the beneficiary. Keep in mind that if you name your estate as a principal beneficiary, you cannot name a contingent beneficiary.
- Naming a Trust: You may name a trust as principal or contingent beneficiary.

If the trust is an existing trust, you must provide the name of the trust, the date of the trust, and the name, telephone number, and address of the trustee and the federal identification number of the trust.

If the trust is a testamentary trust (created by will), you should make the designation as follows: "to my trust, if any, under my will, or if not, to my estate."

- Other Considerations: You cannot name yourself as principal or contingent beneficiary. You also cannot name the same person as both principal and contingent beneficiary. A charitable organization or a religious charity cannot be named as beneficiary unless it is a trust.
- Required Signatures: You must sign and date the form in the Signature section. An individual must also witness your signature and sign the form in the Signature section.
- Changing Your Beneficiary: Prior to retirement you may change your beneficiary designation at any time by completing a new Form 2035.
- If you wish to name more than four principal or contingent beneficiaries, please contact the retirement office.

Principal Beneficiary Section**1.**

Name: _____ %: _____
Social Security Number: _____ Sex: _____
Tax ID if Funded Trust: _____
Date of Birth: _____ Relationship: _____
Address: _____
City: _____ State _____ Zip Code _____

2.

Name: _____ %: _____
Social Security Number: _____ Sex: _____
Tax ID if Funded Trust: _____
Date of Birth: _____ Relationship: _____
Address: _____
City: _____ State _____ Zip Code _____

3.

Name: _____ %: _____
Social Security Number: _____ Sex: _____
Tax ID if Funded Trust: _____
Date of Birth: _____ Relationship: _____
Address: _____
City: _____ State _____ Zip Code _____

4.

Name: _____ %: _____
Social Security Number: _____ Sex: _____
Tax ID if Funded Trust: _____
Date of Birth: _____ Relationship: _____
Address: _____
City: _____ State _____ Zip Code _____

Contingent Beneficiary Section**1.**

Name: _____ %: _____
Social Security Number: _____ Sex: _____
Tax ID if Funded Trust: _____
Date of Birth: _____ Relationship: _____
Address: _____
City: _____ State _____ Zip Code _____

2.

Name: _____ %: _____
Social Security Number: _____ Sex: _____
Tax ID if Funded Trust: _____
Date of Birth: _____ Relationship: _____
Address: _____
City: _____ State _____ Zip Code _____

3.

Name: _____ %: _____
Social Security Number: _____ Sex: _____
Tax ID if Funded Trust: _____
Date of Birth: _____ Relationship: _____
Address: _____
City: _____ State _____ Zip Code _____

4.

Name: _____ %: _____
Social Security Number: _____ Sex: _____
Tax ID if Funded Trust: _____
Date of Birth: _____ Relationship: _____
Address: _____
City: _____ State _____ Zip Code _____

Signature Section: This section must be completed before we can accept this Form 2035.

Your Signature: _____

Date: _____

Witness Signature: _____

Please initial any and all corrections you have made to the form.