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Members are encouraged to designate a beneficiary(ies) at time of initial enrollment and to regularly review and update their beneficiary information as needed. Upon retirement or entering DROP, each member must select a retirement option and, if applicable, an option beneficiary. ILSB retirees and members entering DROP will also select a DROP/ILSB beneficiary(ies).

TRSL's beneficiary designation forms and procedures have been created to conform to statutes that govern TRSL death benefits:

- Survivor benefits – [LSA R.S. 11:762](#)
- DROP/retirement applicant death – [LSA R.S. 11:783](#)

### Employer's role

Even though **it is the member's responsibility to complete and submit beneficiary designation forms to TRSL**, employers have an important role in assisting TRSL with its mission to ensure members have updated beneficiary forms on file.

As the employer, you are encouraged to distribute TRSL beneficiary designation forms to TRSL-covered employees upon hire and when employees request to change their beneficiary(ies), or you can direct employees to the TRSL website for the appropriate forms.

**Employers do not need to collect or return employees' beneficiary forms to TRSL. Members should be instructed to return these forms to TRSL on their own.**

Some employers, however, may choose to collect completed beneficiary forms and submit on behalf of their employees. If you choose to take on this additional task, you should mail these forms to TRSL immediately. Do not hold these forms.

### Beneficiary form basics

TRSL's beneficiary forms have key rules and guidelines:

**A new beneficiary form replaces all prior beneficiary designations for the same form type**

When filling out a new form 3, 3A, 3B, or 3C to update beneficiaries, the member should include any beneficiaries that are not changing, in addition to new or changing beneficiaries.

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### **An original, properly executed beneficiary form is required**

The original form (no faxes or emails) must be completed, contain witness or notary signatures as specified on the form, and should be void of any alterations; no scratch-outs, erasures, or use of white-out are permitted. Witness signatures must be signed by persons other than named beneficiaries.

### **Selecting multiple beneficiaries**

The beneficiary forms (3, 3A, 3B, 3C) discussed in this index enable the applicant to name multiple primary beneficiaries, and if desired, multiple contingent beneficiaries. When naming multiple primary and/or contingent beneficiaries, the member should indicate the percentage of the benefit to be paid to each named beneficiary. Primary and contingent beneficiaries must separately total 100%. If no percentages are specified, the percentage will be split equally among all beneficiaries.

If a member wishes to designate more beneficiaries than allowed on the initial form, additional forms should be used. All beneficiary forms must be submitted at the same time because separate submission will replace prior designated beneficiaries in TRSL's files.

### **Beneficiary designation forms become effective when received in the TRSL office.**

Ideally, your employees should submit their own beneficiary forms directly to TRSL. However, if your agency does submit these forms on behalf of employees, it is important to do so immediately after they are completed.

Forms received by TRSL after the date of the member's/retiree's death shall be null and void. Beneficiary forms retained by the employer that have not been received by TRSL are also invalid.

### **Who can employees name as beneficiary?**

A member can name only human beings or his/her succession as beneficiaries. Designations such as churches, financial institutions, organizations, charities, and trusts are not valid designations.

### **What is a primary beneficiary?**

A primary beneficiary is a person(s) or succession named by a member to receive benefits after his or her death. Primary beneficiaries are the member's first choice to receive any death benefits that may be due. If multiple primary beneficiaries are designated, and one primary beneficiary dies prior to the member, benefits are split accordingly among surviving primary beneficiaries.

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### ***What is a contingent beneficiary?***

A contingent beneficiary receives eligible benefits *only if* there are no primary beneficiaries living when a member dies. Contingent beneficiaries must be designated on the appropriate TRSL beneficiary designation form(s). For retired members, contingent beneficiaries cannot be designated as **retirement option** beneficiaries, except for Option 1.

### **Non-retired members**

All members (active or inactive) are encouraged to designate a beneficiary(ies) for their employee contributions in the event of the member's death before retirement.

If a member's death occurs prior to retirement, the designated beneficiary(ies) will be eligible for a refund of the employee's contribution balance if there are no survivor benefits payable.

### **Form 3**

Each member, who is not retired or participating in DROP, should complete a [Beneficiary Designation for Non-Retired Members](#) (Form 3) to designate beneficiary(ies) for their TRSL employee contributions.

When completing the form, the member must designate a primary beneficiary(ies). If desired, a contingent beneficiary(ies) can also be named. Members are encouraged to provide Social Security numbers and birth dates for all of their named beneficiaries. The form must also be witnessed by persons other than the beneficiaries.

The original form must be submitted void of alterations. There can be no scratch-outs, erasures, or use of white-out materials on the form. Upon receipt of a properly executed form, all previous designations will be replaced.

Employers should include Form 3 in their new hire/new employee orientation packets to distribute to employees who will be enrolled in TRSL, along with any other forms your agency requires as part of its hiring process.

### **Life events and reviewing beneficiaries**

It is important that employees review their beneficiary designations periodically, especially whenever they have a significant life event such as marriage, divorce, birth/adoption in the family, or death in the family. Prior to retirement, a member can submit a new [Beneficiary Designation for Non-Retired Members](#) (Form 3) at any time to update his/her beneficiary(ies).

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## Employee wills

**A will does not override, nor is it a substitute for, a TRSL beneficiary designation form.**

If a member dies without a valid beneficiary designation form on file, any benefits due will be paid out in accordance with Louisiana Revised Statutes, which may not match instructions expressed in a member's will.

## Option 1 retirees

Option 1 is the only retirement option that enables a TRSL retiree to designate more than one beneficiary. Option 1 also enables the retiree to change beneficiaries at any time prior to the retiree's death. Option 1 beneficiaries receive the remaining balance of the retiree's contributions (if any) in one lump-sum payment upon the retiree's death.

### Form 3A

To change beneficiaries, an Option 1 retiree must complete the [Change of Beneficiary for Option 1 Retiree](#) (Form 3A). A member can contact TRSL to verify that there is a remaining Option 1 balance prior to submitting this form.

The retiree must have the completed form notarized. The original form must be submitted void of alterations. There can be no scratch-outs, erasures, or use of white-out materials on the form. Upon receipt of a properly executed form, all previous designations will be replaced.

## DROP and ILSB accounts

DROP and ILSB accounts are separate from retirement benefits. A retiree can have one beneficiary for their retirement benefit and can name a different person(s) as beneficiary(ies) for their DROP or ILSB account. DROP/ILSB account beneficiaries can also be changed at any time prior to the retiree's death. DROP/ILSB account beneficiaries receive the remaining balance (if any) in the DROP or ILSB account upon the retiree's death.

### Form 3B

To change the DROP or ILSB account beneficiary, the retiree will need to complete a [Beneficiary Designation for DROP and ILSB Accounts](#) (Form 3B).

- If the member was married at the time of their DROP or ILSB retirement application and has not designated their spouse to receive at least 50% of the DROP/ILSB account, the member's spouse will need to complete a [DROP or ILSB Account Spousal Consent](#) (Form

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11G), which requires notarization.

- » *The Spousal Consent (Form 11G) is not necessary if the retiree designated their spouse to receive 50% or more of the account balance.*
- » *If the retiree did not designate their spouse to receive 50% or more of the account balance and a completed Form 11G is not received, 50% of the account balance will be paid to the spouse and the remaining 50% of the account balance will be divided proportionally among other designated beneficiaries, or equally if no percentage is designated.*
- » *If there were no previously acceptable beneficiary designations submitted, 50% of the account balance will be paid to the spouse and the remaining funds in the account balance will be paid to the retiree's estate.*
- If the member was married at the time of their DROP or ILSB retirement application but is no longer married, the member must submit a Judgment of Divorce or Death Certificate before the beneficiary(ies) can be updated.

As the employer, you can send this form to your DROP participants or ILSB retirees; **however, it is the responsibility of the member to complete and submit the form to TRSL.** If you choose to submit the form on behalf of the member, please send to TRSL as soon as you receive it. The form must be received by TRSL prior to the retiree's death in order to be considered valid.

**Louisiana is a community property state. Should a married retiree designate the spouse to receive less than 50% of the balance of the DROP or ILSB account, a [DROP or ILSB Account Spousal Consent](#) (Form 11G) must also be completed.**

The form must be witnessed by persons other than the beneficiaries. The original form must be submitted to TRSL, and it should be void of any alterations; no scratch-outs, erasures, or use of white-out are allowed. Upon receipt of a properly executed form, all previous designations will be replaced.

***If a member dies within 30 days of their effective DROP beginning date, a DROP account will not be set up. The beneficiary/ies listed on the Form 3B will not be applicable.***



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## Return-to-work retirees

TRSL retirees who return to work in a TRSL-eligible position, and meet the criteria to continue to receive their TRSL retirement benefits, are required to pay contributions on salary earned. These rehired retirees should designate a beneficiary(ies) for their return-to-work employee contributions in the event of the member's death before ending re-employment or obtaining a refund.

### Form 3C

Each rehired retiree who will be making TRSL contributions, with the exception of those enrolled under RTW Option 2 in the 2020 RTW Group, should complete a [Beneficiary Designation for Retiree Return-to-Work Employee Contributions](#) (Form 3C).

When completing the form, the member must designate a primary beneficiary(ies). If desired, a contingent beneficiary(ies) can also be named. Members are encouraged to provide Social Security numbers and birth dates for all of their named beneficiaries. The form must also be witnessed by persons other than the beneficiaries.

The original form must be submitted void of alterations. There can be no scratch-outs, erasures, or use of white-out materials on the form.

Upon receipt of a properly executed form, all previous return-to-work beneficiary designations will be replaced.

Employers should include Form 3C in their new hire/new employee orientation packets to distribute to eligible employees who are TRSL retirees returning to work and will be contributing to TRSL, along with any other forms your agency requires as part of its hiring process.

## Retiree refunds and return-to-work beneficiary designations

Return-to-work (RTW) retirees who refund their RTW contributions will also render any Form 3C beneficiary designations on file prior to the refund as null and void.

If your agency is enrolling a rehired retiree who will be making TRSL contributions and who previously refunded his/her RTW contributions, the rehired retiree should complete a new Form 3C. If a properly executed Form 3C has not been received after the refund and before the retiree's death, any RTW contributions balance after the retiree's death will be due the retiree's estate. TRSL cannot use a Form 3C received prior to the refund date to pay out RTW contribution balance.

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### Confirming employee beneficiaries

Both employers and members can view beneficiary information through EMIS. Only primary beneficiaries will be displayed; return-to-work beneficiaries will not be displayed.

<b>Members</b>
<b>Member Summary</b>
Account History
Member Notations
Monthly Salary/Contributions
Annual Salary History
Benefit Payroll

#### Employer Access - EMIS

Employers can view only non-retired employees' beneficiaries on the employer access database.

- Log into EMIS.
- Select Member Summary under Members menu.
- See "Beneficiaries" section at bottom of the screen for employee beneficiary info.
- If screen displays "No beneficiaries on file" for a non-retired employee, then TRSL does not have a valid Form 3 on file.

#### TRSL Regular Plan Information

Date of Service Accrual: 09/09/1996		Average Comp: \$2,047.60	
Switch-Over Date:			
Social Security Eligibility Date:		Original Retirement Plan	
Service Credit for Benefit Computation		Member Contributions	
Regular Service	19.85	Tax-Sheltered Regular Savings	28,371.14
		Regular Salary Report as of 12/2016	640.00
Estimate as of 06/30/2016	19.85	Total Contributions	29,011.14

Service credit for eligibility as of 06/30/2016: 19.85

Employment History				
Empr ID	Emp Ind	Employer Name	RTW Type	Employment Dates
	P	SC B		/1996 to 99/99/9999

Beneficiaries					
Name	SSN	Gender	Birth Date	Relation	Type
	63	Female	11/ /1986	CHILD	

Beneficiaries					
Name	SSN	Gender	Birth Date	Relation	Type
No beneficiaries on file.					

Employers can provide the employee with a blank Form 3. It will be the employee's responsibility to complete the beneficiary designation form and submit it to TRSL.

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### Member Access - EMIS

Employees/retirees who have signed up for Member Access can verify their beneficiary information on file at any time.

#### Non-retired members

Members' beneficiary information can be verified by viewing the "Employment Summary" screen.





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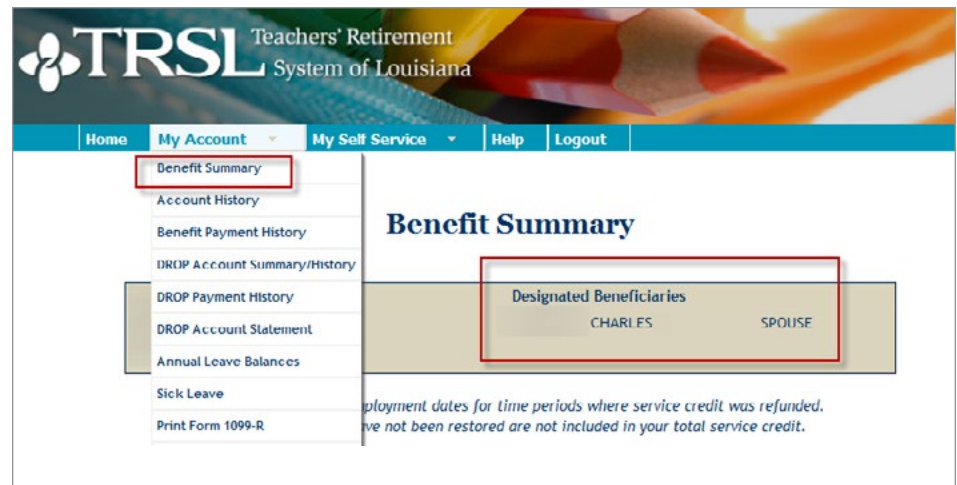
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### Retirees

Retirees can confirm their option beneficiary information by viewing the "Benefit Summary" screen.



**Benefit Summary**

Designated Beneficiaries	
CHARLES	SPOUSE

employment dates for time periods where service credit was refunded. have not been restored are not included in your total service credit.

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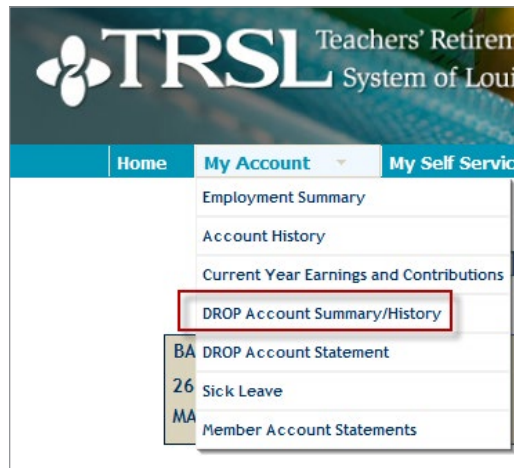
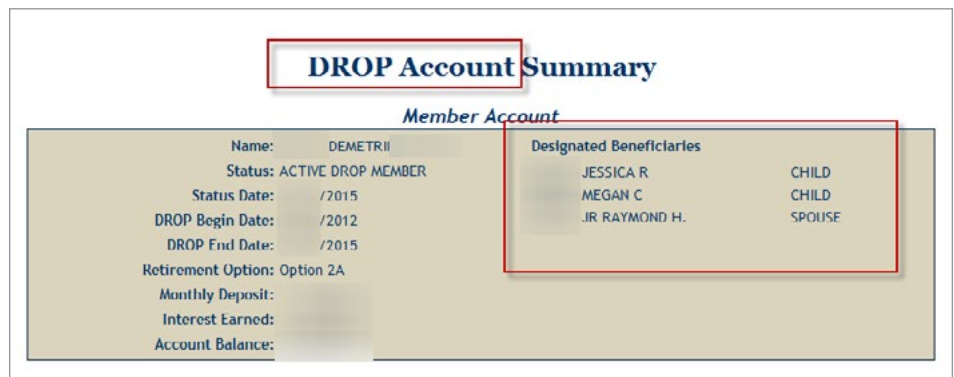
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### DROP/ILSB accounts

DROP participants and ILSB retirees can view their DROP or ILSB account beneficiary information by viewing the "DROP Account Summary/ History" screen.

The screenshot shows the 'DROP Account Summary' screen for Member Account DEMETRII. The screen is divided into two main sections: Member Account details and Designated Beneficiaries. The Member Account details section includes fields for Name, Status, Dates, Retirement Option, Monthly Deposit, Interest Earned, and Account Balance. The Designated Beneficiaries section lists three beneficiaries: JESSICA R (CHILD), MEGAN C (CHILD), and JR RAYMOND H. (SPOUSE). The Designated Beneficiaries section is highlighted with a red box.

Member Account	
Name:	DEMETRII
Status:	ACTIVE DROP MEMBER
Status Date:	/2015
DROP Begin Date:	/2012
DROP End Date:	/2015
Retirement Option:	Option 2A
Monthly Deposit:	
Interest Earned:	
Account Balance:	

Designated Beneficiaries	
JESSICA R	CHILD
MEGAN C	CHILD
JR RAYMOND H.	SPOUSE

### Return-to-work retirees

Return-to-work beneficiary information is not updated in EMIS, and will not be available for viewing on the Member Access system. TRSL retains any RTW beneficiary information (from the most recently completed and valid Form 3C) in the member's TRSL file, to be processed in the event of the rehired retiree's death if there is any return-to-work contribution balance.

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### Frequently asked questions

#### 1. Can an organization, such as a church, be named as beneficiary?

Only human beings or a succession may be named as a beneficiary. Designations such as churches, financial institutions, organizations, charities, and trusts are not valid designations.

#### 2. What happens if the employee does not name a beneficiary?

If no beneficiary is named and no survivor benefits are payable, then the member contributions will be paid to the deceased member's estate as specified in Louisiana law. Estate payments can trigger an increased tax liability and create delays in death payment benefits since heirs may be required to produce additional paperwork. This may not be what the member would have wanted for his/her loved ones.

#### 3. Can the employee change his retirement beneficiary?

If the member is active, a change can be made in beneficiary designation at any time by completion of a [Beneficiary Designation for Non-Retired Members](#) (Form 3).

If the member is retired, only retirees who chose Retirement Option 1 can change their retirement option beneficiaries. To do this, the retiree will need to submit a [Change of Beneficiary for Option 1 Retiree](#) (Form 3A) to TRSL.

DROP participants and DROP/ILSB retirees who have a remaining balance in their DROP or ILSB accounts can update their DROP or ILSB account beneficiary(ies) by completing a new [Beneficiary Designation for DROP and ILSB Accounts](#) (Form 3B).

Return-to-work (RTW) retirees who will make post-retirement member contributions to TRSL on their return-to-work position(s), with the exception of those enrolled under RTW Option 2 in the 2020 RTW Group, can make a RTW beneficiary change by submitting a [Beneficiary Designation for Retiree Return-to-Work Employee Contributions](#) (Form 3C).

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### 4. Does the employee's retirement beneficiary have to also be the beneficiary of his DROP/ILSB account?

*No. DROP/ILSB applicants can elect to have different beneficiaries for their monthly retirement check (also referred to as the retirement option beneficiary) and their DROP/ILSB account. Members should be reminded that Louisiana is a community property state. If the member is married at the time of their DROP or ILSB retirement application and has not designated their spouse to receive at least 50% of the DROP/ILSB account, the member's spouse will need to complete a [DROP or ILSB Account Spousal Consent](#) (Form 11G), which requires notarization.*

### 5. Can the employee fax in the beneficiary form?

*No. TRSL requires all beneficiary designation forms to be originals. Faxed or emailed copies cannot be accepted.*