



# INSTRUCTIONS

The Employee Change Form enables you to change information in your Oakland Performance Retirement System account.

You will receive a confirmation of your changes. You will also receive a quarterly financial statement. Please review these carefully. If you discover a discrepancy, contact Customer Services at 1-800-669-7400 immediately. All discrepancies must be reported within 120 days following the end of the quarter. Failure to do so may result in the inability to adjust your account.

## 1. PARTICIPANT INFORMATION-PERSONAL

Please complete this section carefully. The information must be completed in order to process your requested changes. Current County employees should use 9326 as their employer plan number. Participants who have left County service should use 9402 as their employer plan number.

## 2. BENEFICIARY CHANGE

Use this section to change your beneficiary(ies). If you do not sign this form, the new beneficiary(ies) designation you selected will not be valid. If a valid form is not filed, then at the time of your death, benefits will be paid to the beneficiary(ies) named on your Employee Enrollment Form or your most recent valid Employee Change Form. If none of your primary or contingent beneficiaries are living at the time of your death or they cannot be located, the proceeds will be paid to your estate.

**Married Participants** - Your spouse will be the primary beneficiary for 50 percent of your account. You may name your spouse as a beneficiary for up to 100 percent of your account. You may also waive naming your spouse as beneficiary for any part of your account and then you may name someone else as beneficiary. However, if you waive naming your spouse as beneficiary, your spouse must consent to this waiver.

**PLEASE NOTE:** If a Social Security number is not provided and RC cannot locate the named beneficiary, the account balance will be paid to the participant's estate.

## 3. CHANGE OF ADDRESS (SEPARATED PARTICIPANTS ONLY)

Only participants who have separated from County service may use this section to notify RC of their change of address. Participants who are still employed by the County should request the appropriate change form from the County.