Montana Public Employee Retirement Administration
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(406) 444-3154 • Toll Free (877) 275-7372
http://mpera.mt.gov

## SHERIFFS' RETIREMENT SYSTEM (SRS) MEMBERSHIP/DESIGNATION OF BENEFICIARY CARD

## MEMBER INFORMATION

| MEMBER INFORMATION |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| Last Name |  | First Name, MI |  | Social Security Number* |
| Date of Birth I | Gender <br> —M | Employing Agency |  | Employer Number (MPERA use only) |
| Mailing Address |  |  |  |  |
| City |  |  | State | Zip Code |
| Daytime Phone Number <br> ( ) |  | Email Address |  |  |
| Type Of Position (check one): |  | $\square$ Sheriff $\square$ Under Sheriff $\square$ Deputy Sheriff $\square$ Detention Officer$\square$ Gambling or Criminal Investigator |  |  |
| PRIMARY AND/OR CONTINGENT BENEFICIARY DESIGNATION |  |  |  |  |

## I wish to retain SRS beneficiary designation currently on file with MPERA.

Completion of this section revokes all prior beneficiary designations unless you are prohibited from changing your beneficiary by a valid temporary restraining order issued pursuant to § 40-4-121, MCA. You may designate one or more primary or contingent beneficiaries by using a separate line for each person. Contingent beneficiaries receive benefits only if all listed primary beneficiaries are deceased. If you list two or more primary (or two or more contingent beneficiaries) they will be treated on a share and share alike basis. If you prefer a different allocation, please specify. If you designate a trust (for the benefit of a natural living person only), a charitable organization or your estate as a primary or contingent beneficiary, you will also need to complete the "Other designation" section.

| Primary Beneficiary - attach additional list if necessary. <br> Full Name Gender $\quad$ Relationship |
| :--- |

Contingent Beneficiary (optional) - attach additional list if necessary.

| Full Name | Gender | Relationship | Birth Date | SSN* | Allocation |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | $\square \mathrm{M} \quad \square \mathrm{F}$ |  |  |  | \% |
|  | $\square \mathrm{M} \square \mathrm{F}$ |  |  |  | \% |
|  | $\square \mathrm{M} \square \mathrm{F}$ |  |  |  | \% |

Other designation (NOTE: Any designated trust must already be in existence-this form cannot create a trust.)

| Name of Trust, Charity or Estate | Trustee/Contact Name | Address |
| :--- | :--- | :--- | :--- |
| REQUIRED SIGNATURES |  |  |
| Member Signature | Date |  |
| Witness Name Printed (not a beneficiary) | Signature | Date |

Original signatures are required. MPERA cannot accept faxed or photocopies of this form.
This form must be filed with MPERA before any changes will take effect.

