

JRS Member Change of Beneficiary Form

Instructions

You can change your beneficiary at any time by logging in to your account at ers.ga.gov

This form is for JRS Active or Inactive Members to update beneficiaries for their Retirement Benefit.

- JRS Retiree: Use the JRS Retiree Change of Beneficiary Form or change your beneficiary online at ers.ga.gov.
- Covered for ERSGA Group Term Life Insurance (GTLI): Use the GTLI Change of Beneficiary Form or change your beneficiary online at ers.ga.gov.
- If you are a Member or Retiree of one of the below retirement systems, change your beneficiary online or use the form appropriate for that system:
 - Employees' Retirement System of Georgia (ERS)
 - Public School Employees Retirement System (PSERS)
 - Legislative Retirement System (LRS)
 - Georgia Defined Contribution Plan (GDGP)

Complete, sign, and mail or upload this **original form** to ERSGA along with a copy of a **valid photo identification**. Do not email or fax. Valid photo identification is one of:

- Valid Georgia Driver's License
- Valid U.S. passport ID, U.S. military photo ID, or tribal photo ID
- Any valid state or federal government-issued photo ID, including a free ID Card issued by your county registrar's office or the Georgia Department of Driver Services (DDS)

Changes are not valid until received by ERSGA. A Will does not take precedence over this designation.

Sections 1 and 3: Your Information and Signature

Section 1: Complete all information.

Section 3: Original (Handwritten) Signature and date to acknowledge:

- Understanding of conditions below and authorization to change beneficiary designation.
- You have attached a clear, legible copy of a valid photo ID.

Section 2: Retirement Benefit Beneficiary Information

- Primary and secondary beneficiaries do not share benefits. Benefits will only be paid to a secondary beneficiary if all primary beneficiaries pre-decease you.
- If you wish to name multiple beneficiaries, please write "see attached" on this form. On a separate sheet of paper, write the names, percentage of benefit to each beneficiary (must total 100%), and other requested information. You must sign and date the separate sheet, include your Social Security Number (SSN) in the upper right hand corner, and attach to this form.
- "Estate" is only appropriate as a designation if no monthly allowance is left to a beneficiary. A monthly allowance cannot be paid to an estate.

Benefits Upon Death

Primary Beneficiaries: The primary beneficiary(ies) will receive a monthly benefit only if one of these two conditions apply:

- Your membership began prior to July 1, 2012, you elected Spousal Coverage, and you have made Spousal Contributions for at least 10 years prior to death while an active member; **OR**
- Your membership began on or after July 1, 2012, your Spouse is your primary beneficiary, and you have 10 or more years of Vesting Service at your death while an active member.

If none of these conditions are met, your beneficiary will receive a refund of your contributions and interest.

Secondary Beneficiaries: Your secondary beneficiary(ies) will receive the benefit only if the primary Beneficiary(ies) predeceases you.

For more information, see the JRS Handbook on the ERSGA website: ers.ga.gov

If you have any questions about Death Benefits, please contact ERSGA at 404-350-6300.

Online: To use this form, complete, sign, and upload, along with a clear, legible copy of a **valid photo identification** and any other required documentation. The ID Number, name, date of birth, and expiration date must be clear and legible. Valid photo identification is one of:

- Valid Georgia Driver's License
- U.S. passport ID, U.S. military photo ID, or tribal photo ID
- Any valid state or federal government-issued photo ID, including a free ID Card issued by your county registrar's office or the Georgia Department of Driver Services (DDS)

Upload by scanning the documents (use a home scanner or mobile app), log in to your ERSGA account at ers.ga.gov, and click on the *File Upload* link. Allow two business days after uploading a document for it to be available to ERSGA staff.

Mail: Complete, sign, and mail this **original form** along with a copy of a **valid photo identification** and any other required documentation to:

ERSGA
Two Northside 75, Suite 300
Atlanta, GA 30318-7778



JRS Member Change of Beneficiary Form

Complete, sign, and mail or upload this **original form** to ERSGA along with a copy of a **valid photo identification** and any other required documentation. Do not email or fax. Changes are not valid until received by ERSGA.

Section 1: Member Information

Your Information

First Name _____	Mailing Address _____
Middle Initial _____	City _____
Last Name _____	State _____
SSN _____	Zip _____
Date of Birth _____ (mm/dd/yyyy)	Phone _____
	Email _____

Section 2: Retirement Benefit Beneficiaries

A. Primary

First Name _____	Mailing Address _____
Middle Initial _____	City _____
Last Name _____	State _____
Relationship to _____	Zip _____
Date of Birth _____	Phone _____

B. Secondary

First Name _____	Mailing Address _____
Middle Initial _____	City _____
Last Name _____	State _____
Relationship to _____	Zip _____
Date of Birth _____	Phone _____

Section 3: Signature & Acknowledgement

I acknowledge:

- I have read and understand the instructions on Page 1 and 2 of this form.
- I designate the above for any benefits due after my death.
- I have attached a clear, legible copy of my photo ID.

Signature (handwritten)

Date