

# HRO BULLETIN

A NAVY REGION SOUTHWEST HUMAN RESOURCES OFFICE PUBLICATION

HRO-0002

July 2009

## ARE YOUR BENEFICIARY FORMS UP TO DATE?

Federal employees should keep their personnel records and beneficiary forms current. It is not required that you designate a beneficiary for your benefits. If the orders of precedence listed below meet your needs, you don't need to do anything. If you wish to name a person or persons not included below, or in a different order, you will need to complete a form to accomplish this. It is your decision whether to complete beneficiary forms or not. If you do complete any beneficiary forms, it is your responsibility to keep them up-to-date and reflecting your current wishes.

Benefits that are due and payable will be paid out in the following **Order of Precedence**:

- to your designated beneficiary (ies)
- if there is no designated beneficiary, to your widow or widower
- if none, to your child or children in equal shares, with the share of any deceased child distributed among that child's descendants
- if none, to your parents in equal shares or the entire amount to your surviving parent
- if none, to the executor or administrator of your estate
- if none, to your next of kin under the laws of the State where you lived at the time of your death

**Note:** For life insurance (FEGLI), if there is a qualifying court order or an assignment of benefits on file, they take precedence over any designation of beneficiary on file and the normal order of precedence above.

Although you may not change your beneficiaries on-line, you may download the forms you need to change your beneficiaries by accessing the Employee Benefits Information System (EBIS) at <http://www.civilianbenefits.hroc.navy.mil/>.

Submit properly completed forms as shown below:

<u>PROGRAM</u>	<u>FORM NUMBER</u>	<u>SEND DIRECTLY TO:</u>
CSRS Retirement	<a href="#">SF-2808</a>	U.S. Office of Personnel Management, Retirement Operations Center, P.O. Box 45, Boyers, PA 16017-0045
FERS Retirement	<a href="#">SF-3102</a>	CBC Southwest (2414), 525 B Street, Suite 600, Code 43, Attn: Records Room, Code 536, San Diego, CA 92101-4418
Thrift Savings Plan	<a href="#">TSP-3</a>	TSP Service Office, P.O. Box 385021, Birmingham, AL 35238
Unpaid Compensation	<a href="#">SF-1152</a>	CBC Southwest (2414), 525 B Street, Suite 600, Code 43, Attn: Records Room, Code 536, San Diego, CA 92101-4418
Life Insurance	<a href="#">SF-2823</a>	CBC Southwest (2414), 525 B Street, Suite 600, Code 43, Attn: Records Room, Code 536, San Diego, CA 92101-4418

You'll need to print and sign the forms in the presence of two witnesses. The witnesses can be anyone that is not named as a beneficiary. Your personal acquaintances can best serve as witnesses should the designation be contested in a court of law. Once complete, keep a copy for yourself and mail the original form with original signatures to the appropriate address indicated above. Any attachments to the designation of beneficiary form(s) must be signed and witnessed.

**Please Note:** Your beneficiary forms for TSP and CSRS are not valid until they are received at the addresses indicated above. If you do not send them directly to the appropriate address, and you die before the appropriate office receives the form, the designation on the beneficiary form will not be valid. **It is your responsibility to send the forms to the appropriate office for processing.**

**For further information and assistance,** contact the Benefits line at 1-888-320-2917.