

## Group Life Beneficiary Designation/Change

### IMPORTANT INFORMATION ABOUT BENEFICIARY DESIGNATIONS

Use this form to designate or make changes to the beneficiary(ies) of your Group Insurance death proceeds. The information on this form will replace any prior beneficiary designation. You may name anyone or any entity as your beneficiary and you may change your beneficiary at any time by completing a new Group Insurance Beneficiary Designation/Change form and filing it with your Benefits Administrator or Prudential. Common designations include individuals, estates, corporation/organizations, and trusts. **Payment will be made to the named beneficiary. If there is no named beneficiary, or the named beneficiary predeceased the insured, settlement will be made in accordance with the terms of your Group Contract.** Please refer to the Booklet-Certificate, which is made a part of the Group Contract, for all plan details, including any exclusions, limitations, and restrictions, which may apply.

### HELPFUL DEFINITIONS

**Primary Beneficiary(ies):** The person(s) or entity you choose to receive your life insurance proceeds. Payment will be made in equal shares unless otherwise specified. If a primary beneficiary predeceases the insured, the proceeds will be paid to the remaining primary beneficiaries in equal shares or all to the sole remaining primary beneficiary, unless otherwise specified by you.

**Secondary Beneficiary(ies):** The person(s) or entity you choose to receive your life insurance proceeds if the primary beneficiary(ies) die (or the entity dissolves) before you die. Payment will be made in equal shares unless otherwise specified. If a contingent beneficiary predeceases the insured, the proceeds will be paid to the remaining secondary beneficiaries in equal shares or all to the sole remaining secondary beneficiary, unless otherwise specified by you.

### TO DESIGNATE A PRIMARY OR SECONDARY BENEFICIARY, COMPLETE THE FOLLOWING SECTIONS:

#### 1. EMPLOYEE INFORMATION

- All information in this section is required.
- **NOTE:** Unless otherwise indicated in Section 2, the information supplied on the form will apply for your Group Term Life coverage only issued by The Prudential Insurance Company of America (Prudential) to the group contract holder.

#### 2. BENEFICIARY DESIGNATION

- You may name more than one primary and more than one secondary beneficiary. This form allows you to name up to five beneficiaries. Please indicate Primary or Secondary for each beneficiary designated. If you need additional space, photocopy the appropriate page and return.
- Please indicate the percentage share designated to each beneficiary. The total for all primary beneficiaries must equal 100%. If no percentages are specified, the proceeds will be split evenly among those named. Payment will be made to the named beneficiary. If there is no named beneficiary, or the named beneficiary predeceased the insured, settlement will be made in accordance with the terms of your Group Contract. The percentage for all secondary beneficiaries must also equal 100%. If no percentages are specified, the proceeds will be split evenly among those named.
- You can name an individual, corporation/organization, trust, or an estate as a beneficiary. The following examples may be helpful in designating beneficiaries:

Individual: "Mary A. Doe"

- \* Each name should be listed as first name, middle initial, last name ("Mary A. Doe," not "Mrs. M. Doe")
- \* Include the address and relationship for each individual listed.
- \* Indicate the percentage to be assigned to each individual.

Estate: "Estate of the Insured"

- \* Select "Other" as the Beneficiary Description and write "Estate" in the blank space provided.
- \* Indicate the percentage to be assigned to the Estate of the Insured.

Corporation/Organization: "ABC Charitable Organization"

- \* Select "Corporation/Organization" as the Beneficiary Description.
- \* Write the legal name of the corporation or organization in the space for the Beneficiary's First Name.
- \* You must provide the address, city, and state of operation for each organization or corporation listed.
- \* Indicate the percentage to be assigned to the corporation or organization.

#### 3. TRUST DESIGNATION: "The John Doe Trust. A Trust with a trust agreement dated 1/1/99 whose Trustee is Jane Smith."

- \* Please complete Section 3, on page 5, if selecting a Trust as a Beneficiary Designation.
- \* Indicate if the Trust is a Primary or Secondary beneficiary.
- \* Indicate the percentage to be assigned to the trust.
- \* If you are naming a trust as a primary or secondary beneficiary, fill in the name and address for each trustee.
- \* Fill in the title and date of the Trust Agreement in the space provided.

#### 4. AUTHORIZATION/SIGNATURE

- The employee must read, sign, and date the authorization.
- Submit the completed form to Prudential or your Benefits Administrator and keep a copy for your records.





Grid for Social Security Number

1 Employee Information

All the information in this section is required. Unless otherwise indicated on page 4, this Beneficiary Designation/Change form applies to All Group Term Life coverages offered under my Employer's group plan.

First Name, MI, Last Name fields

Address 1, Social Security Number fields

Address 2, Date of Birth (MM DD YYYY) fields

City, State, ZIP fields

Daytime Telephone Number, Home Telephone Number fields

Gender (Male/Female), Marital Status (Married/Single/Divorced/Widowed) fields

Employer/Policyholder field

Control Number (required), Date Hired (MM DD YYYY), Retirement Date (if applicable) (MM DD YYYY) fields

2 Beneficiary Designation

I hereby revoke any previous designations of primary beneficiary(ies) and secondary beneficiary(ies), if any, and in the event of my death, designate the following:

Primary Beneficiary If selecting a Trust, please go to Section 3.

Description (Individual, Corporation/Organization, Other) field

First Name, MI, Last Name fields

Social Security or Tax ID Number, Date of Birth or Creation (MM DD YYYY) fields

Address 1 field

Address 2, Telephone Number fields

City, State, ZIP fields

Relationship, Share % fields

Please be sure to sign and date Page 6 of this form prior to mailing.





SSN input boxes

2 Beneficiary Designation (Cont'd.)

Primary Beneficiary Secondary Beneficiary

Form fields for Primary Beneficiary: Description, Name, SSN, Date of Birth, Address, Telephone, City, State, ZIP, Relationship, Share.

Primary Beneficiary Secondary Beneficiary

Form fields for Secondary Beneficiary: Description, Name, SSN, Date of Birth, Address, Telephone, City, State, ZIP, Relationship, Share.

Please be sure to sign and date Page 6 of this form prior to mailing.





SSN input boxes

2 Beneficiary Designation (Cont'd.)

Primary Beneficiary

Secondary Beneficiary

Form fields for Primary Beneficiary: Description, Name, SSN, Date of Birth, Address, Telephone, City, State, ZIP, Relationship, Share.

Primary Beneficiary

Secondary Beneficiary

Form fields for Secondary Beneficiary: Description, Name, SSN, Date of Birth, Address, Telephone, City, State, ZIP, Relationship, Share.

If additional Beneficiaries are being named, photocopy this page and return.

If you do not want all of the above designations applied to all Group Term Life coverage(s) you must complete a separate form for each coverage.

This form applies ONLY to my: [ ] coverage(s).

Please be sure to sign and date Page 6 of this form prior to mailing.





SSN input boxes

3 Trust Designation

Primary Secondary

And successor(s) in trust, as Trustee(s) under (Title of Agreement)

Trustee title input box

Trustee First Name

Trustee First Name input boxes

MI

MI input box

Last Name

Last Name input boxes

Tax ID Number

Tax ID Number input boxes

Date of Creation (MM DD YYYY)

Date of Creation input boxes

Share

Share input boxes and % symbol

Address 1

Address 1 input boxes

Address 2

Address 2 input boxes

Telephone Number

Telephone Number input boxes

City

City input boxes

State

State input boxes

ZIP

ZIP input boxes

Primary Secondary

And successor(s) in trust, as Trustee(s) under (Title of Agreement)

Trustee title input box

Trustee First Name

Trustee First Name input boxes

MI

MI input box

Last Name

Last Name input boxes

Tax ID Number

Tax ID Number input boxes

Date of Creation (MM DD YYYY)

Date of Creation input boxes

Share

Share input boxes and % symbol

Address 1

Address 1 input boxes

Address 2

Address 2 input boxes

Telephone Number

Telephone Number input boxes

City

City input boxes

State

State input boxes

ZIP

ZIP input boxes





Employee's Social Security Number

□□□□ □□ □□□□

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### Authorization/ Signature

I authorize Prudential or my employer to record and consider the individuals/institutions that I have named on this form as beneficiaries for benefits under the applicable employee benefit plans. If designating a trust as beneficiary, I understand Prudential assumes no obligation as to the validity or sufficiency of any executed Trust Agreement and does not pass on its legality. In making payment to any Trustee(s), Prudential has the right to assume that the Trustee(s) is acting in a fiduciary capacity until notice to the contrary is received by Prudential at its Group Life Claim office. I agree that if Prudential makes any payment(s) to the Trustee(s) before notice is received, Prudential will not make payment(s) again.

Employee's  
Signature X

Date Signed (MM DD YYYY)

□□ □□ □□□□

**The employee must sign and date this form. The signature date must be the date the employee actually signed the form.**

Group Term Life Insurance coverage is issued by The Prudential Insurance Company of America, 751 Broad Street, Newark, NJ 07102. The Booklet-Certificate contains all details, including any exclusions, limitations, and restrictions, which may apply. Contract series: 83500.

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