



Carpenters Southwest Administrative Corporation

ADMINISTRATIVE OFFICE: 533 S. Fremont Ave. • Los Angeles, CA 90071-1706 • Tel: (213) 386-8590 • Toll Free (800) 293-1370

www.carpenterssw.org

Designation of Beneficiary Form

Participant Information *{Print or Type Only. Complete All Fields.}*

Name _____		Social Security # _____	Date of Birth _____
Address _____		City _____	ST _____ Zip _____
Present Local #: _____	Work Status: _____	Active _____	Retired _____
Marital Status: _____			
Married _____	Single _____	Divorced _____	Widowed _____

Participant's Designation of Beneficiary(ies) *{Give Full Name of Beneficiary. Example: Mary J. Smith, Not Mrs. John R Smith}*

Beneficiary Name _____	Social Security # _____	Relationship _____	% of Benefit _____
Address _____		City _____	ST _____ Zip _____
Beneficiary Name _____	Social Security # _____	Relationship _____	% of Benefit _____
Address _____		City _____	ST _____ Zip _____
Beneficiary Name _____	Social Security # _____	Relationship _____	% of Benefit _____
Address _____		City _____	ST _____ Zip _____

Subject to the terms of the Trust Agreements for the Southwest Carpenters Pension Trust, the Southwest Carpenters Health and Welfare Trust, Southwest Carpenters Vacation Trust and the Southern Nevada Annuity Trust, I request that any sum becoming payable to a Beneficiary under said Trusts by reason of my death be payable to the following Beneficiar(ies). It is my understanding and desire that this designation shall operate so as to revoke any and all designations of Beneficiaries previously made by me under said Trusts.

Signature

Date Signed

I AGREE TO THE BENEFICIAR(IES) DESIGNATED ABOVE. If you are legally married and you name a Beneficiary other than your spouse, your spouse must agree to your choice of Beneficiary. Failure to do so will make this document void for Pension purposes.

Signature of Spouse

Date Signed

Please Read Carefully:

- After this form has been completed, send it to the Administrative Office at: 533 South Fremont Avenue, 6th Floor, Los Angeles, CA 90071-1706.
- Send in only one form unless there is a change of Beneficiary.
- **If you do not wish to designate the same Beneficiary for all Trusts, you may request separate Beneficiary forms.**
- This form is the only document that the Trusts will accept regarding your choice of Beneficiary. For example, if you subsequently execute a will or obtain a dissolution of marriage, those documents or court orders will not be effective to change your designated Beneficiary for Trust benefits. You must instead contact the Trust Office and sign a new Designation of Beneficiary Form.
- Your designation revokes all prior designations.
- If you name two or more Beneficiaries: (1) Two or more surviving Beneficiaries will share equally, unless you provide for unequal shares. (2) If only one Beneficiary survives, we will pay the total death benefits to that Beneficiary.
- If a minor (a person not of legal age), or your estate, is the Beneficiary, it may be necessary to have a guardian or a legal representative appointed by the court before any death benefit can be paid.
- A power of attorney must grant specific authority, by the terms of the document or applicable law, to make or change a Beneficiary designation. If you have questions, consult your legal advisor.