



Ohio Carpenters' Pension Plan
P.O. Box 31580, Independence, OH 44131
Phone: (800)-700-6756

INSTRUCTIONS FOR COMPLETING BENEFICIARY DATA CARD

1. Print in ink or type the information requested on the card.
2. Make sure the Social Security Numbers requested are correct.
3. **IF MARRIED** - Federal Law requires that if you are married, your spouse must be the Designated Beneficiary for payment of Pre-Retirement Death Benefits. The beneficiary section therefore must reflect the name and data on your spouse. The only exception to this requirement is if your spouse consents in a notarized written waiver rejecting this benefit and agreeing to another beneficiary being designated. A form for this rejection is available from the Fund Office.
4. **IF YOU ARE NOT MARRIED** - Complete the beneficiary section indicating whom you desire as your beneficiary.
5. Should you change locals, move, or your marital status changes, a new card should be completed.

OHIO CARPENTERS' PENSION FUND BENEFICIARY DESIGNATION FORM (Please Print)

Name _____ Address _____

Street City State ZIP
Social Security Number _____ Date of Birth _____
Local Number _____ Initiation Date or Clearance Date into Present Local _____
Have you had membership in a local other than the above: ☐ Yes ☐ No
If yes, Local Number _____ From _____ To _____
Local Number _____ From _____ To _____
Marital Status: ☐ Married ☐ Single ☐ Divorced ☐ Separated ☐ Widowed
Name of Beneficiary _____ Relationship _____
Social Security Number _____ Date of Birth _____
Address _____
If Married, Date of Marriage _____

Date

Member's Signature