

# CHECKLIST FOR DESIGNATING A BENEFICIARY

Before sending in a form to ATRS that designates a beneficiary, please use this checklist to make sure the form is correct. If you have any questions, call 1-800-666-2877 (toll free) or 682-1517 (Little Rock area). By filling out the form completely and correctly the first time, it will save you the trouble of re-submitting it.

- ☐ Do all the listed beneficiaries have Social Security numbers listed on the form beside their names?
- ☐ Did you list the name of the beneficiary, rather than just "son" or "wife", for example? A complete name of a beneficiary, along with his/her Social Security number, is needed.
- ☐ Did you list yourself as a beneficiary? If so, any qualifying payment will be paid to your estate. If it is for a lump sum death benefit, no benefit will be paid to anyone.
- ☐ Is the form signed?
- ☐ Is the form dated?
- ☐ Is the form notarized?
  - ☐ Is the notary seal present?
  - ☐ Did the notary sign and date after you signed and dated the form?
- ☐ Did you make a mistake and strike out any language? If so, you will need to complete a new form.
- ☐ Did you attach any extra sheets to the form? If so, extra pages are not allowed and will be discarded. If additional pages are needed, copy the beneficiary form for additional pages and put 1 of 2, 2 of 2, etc at the top of each completed page. Each page must be notarized.