

Northwest Carpenters Trusts

Change of Beneficiary

Please complete this form in its entirety and return it to Northwest Carpenters Trusts. Beneficiary instructions and the return address are on the back of this form.

Section 1 – Your Information

Please provide your legal name as it appears on your Social Security card or on your U.S. Individual Income Tax Return.

	Last Name	First Name	MI	Date of Birth	Social Security Number
Your Legal Name					
Mailing Address				Mobile Number ()	
City, State, Zip				Email	

Section 2 – Life Insurance Beneficiary

Please provide the name of the person you want to be the beneficiary of your life insurance.

	Last Name	First Name	MI	Date of Birth	Social Security Number
Beneficiary's Name					
Mailing Address				Mobile Number ()	
City, State, Zip				Relationship	
Email					

Section 3 – Northwest Carpenters Retirement Plan Beneficiary

Please provide the name of the person or persons you want to be the beneficiary of your retirement benefit.

	Last Name	First Name	MI	Date of Birth	Social Security Number
Beneficiary's Name					
Mailing Address				Mobile Number ()	
City, State, Zip				Relationship	
Email					

Section 4 – Your Signature

Please sign this form and return it to Northwest Carpenters Trusts.

Your Signature	Date
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Change of Beneficiary Instructions

Section 1 – Your Information. Please provide all the information requested in this section. You must use your legal name as it appears on your Social Security card or as it appears on your U.S. Individual Income Tax Return.

Section 2 – Life Insurance Beneficiary. List the person who should receive your life insurance benefit. Subject to the applicable community property laws, your life insurance beneficiary can be anyone except an employer and yourself. If your beneficiary does not survive you, or if you do not name a beneficiary, proceeds are paid to the first survivor in the following order: (1) spouse; (2) children, in equal shares; (3) parents, in equal shares; (4) brothers and sisters, in equal shares; (5) executors or administrators.

Section 3 – Northwest Carpenters Retirement Plan. List the name of the person (the beneficiary) who should receive your vested benefits if you die before you retire under this plan. Your spouse is the beneficiary of your preretirement death benefit under the Northwest Carpenters Retirement Plan, even if you designate a nonspouse beneficiary. If you are not married, you may designate any person (or persons) as your beneficiary. However, if you have a minor child or children and they qualify for the Primary Spouse's Benefit, your minor child or children will be the beneficiary of your preretirement death benefit, even if you designate a nonchild beneficiary. A minor child is a child under age 18, or under age 21 if a full-time student. If there is no valid beneficiary designation on file, but you are survived by a lawful spouse or by any children, whether natural, adopted, or stepchildren, then the Trustees, in their discretion, may deem the surviving spouse or children as the beneficiaries.

Section 4 – Your Signature. Please sign and date this application. Northwest Carpenters Trusts cannot process your application without your (the participant's) signature. Please contact Milliman Benefits Center to change your beneficiary for the Northwest Carpenters Individual Account Pension Plan.

Northwest Carpenters Trusts
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Seattle, WA 98111-1929
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