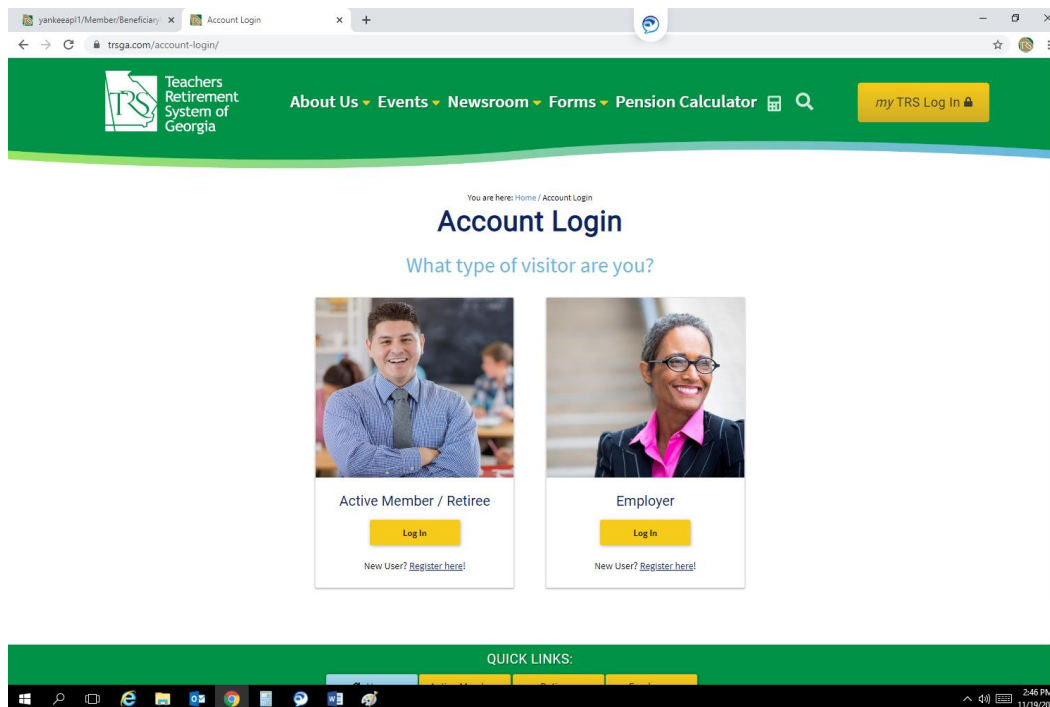


# TRS BENEFICIARY UPDATE INSTRUCTIONS

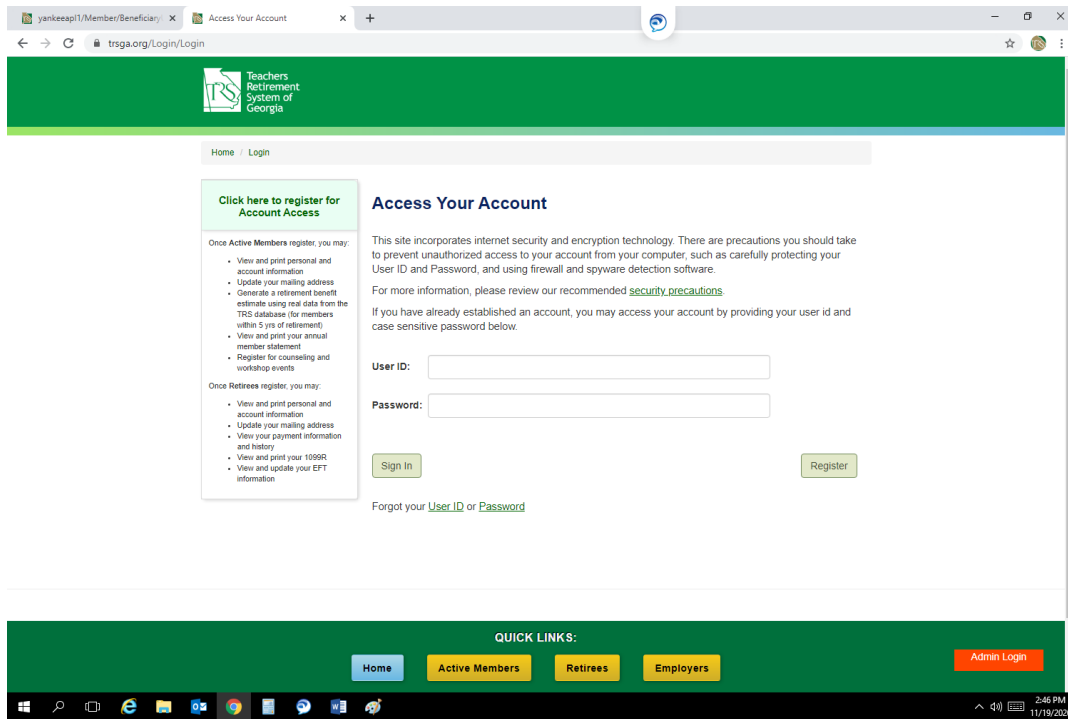
## 1. Click on my TRS Log In button.



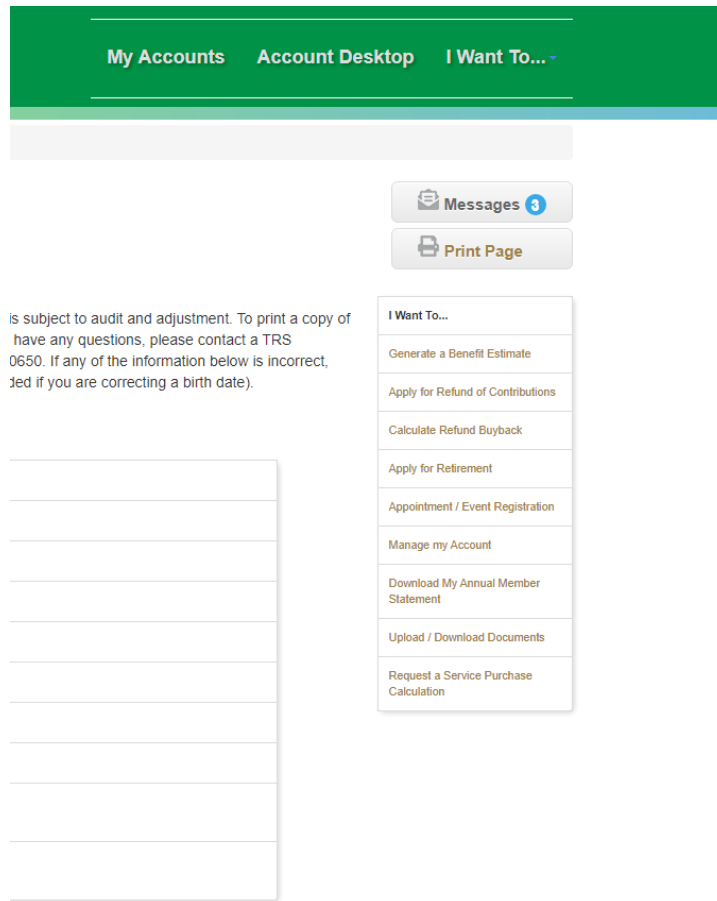
## 2. Click on Active Member/Retiree Log In.



### 3. Sign in or Register a new account



### 4. Click on Manage my Account.



## 5. Click on Edit button next to Beneficiaries.

The screenshot shows a web browser window with the URL `yankeapl1/Member/ManageAccount/`. The page header includes the Teachers Retirement System of Georgia logo and navigation links: [My Accounts](#), [Account Desktop](#), and [I Want To...](#). Below the header is a breadcrumb trail: [Home](#) / [My Accounts](#) / [My Account Summary](#) / [My Account Management](#). The main content area is titled "Account Management" and contains four form boxes, each with an "Edit" button:

- Contact Info**: Fields for Phone and Email Address.
- Address**: A text input field.
- My User Id**: Fields for User Id and Password (masked with asterisks).
- Beneficiaries**: A text input field.

At the bottom of the page, there is a "QUICK LINKS:" section. The Windows taskbar at the bottom shows the time as 2:38 PM on 11/19/2020.

## 6. Agree to Terms and Conditions.

The screenshot shows a web browser window with the URL `yankeapl1/Member/BeneficiaryUpdate/BeneficiariesTerms`. The page header is identical to the previous screenshot. The main content area is titled "TRS Beneficiary Terms and Conditions" and contains the following text:

**Instructions:** Please complete the applicable fields and click Next.

**\*Please note:** If this page is exited without clicking the Save button, any changes made will be discarded.

**\*Indicates a required field.**

TRS law requires that the settlement of your TRS account be made according to the beneficiary designation on file with TRS at the time of your death. In the absence of a beneficiary designation on file with TRS, settlement will be made with the surviving spouse, if applicable. If there is no spouse, settlement will be made to your estate. Wills, divorce decrees, remarriages, etc., do not determine the TRS settlement at your death. Therefore, should your present personal situation call for a change of beneficiary(ies), you are urged to update your beneficiary information timely.

If the primary beneficiary designated by the member does not survive the member by at least 32 days, any survivor benefits will be paid to the secondary beneficiary.

When multiple beneficiaries are designated, the percentage of available benefits or lump-sum settlement of your contributions and interest to be paid to each beneficiary must be indicated. The total percentage paid to all beneficiaries must be 100% of the available benefits or lump-sum settlement of your contributions and interest. If no percentages are designated, the available benefits or lump-sum settlement of your contributions and interest will be divided equally.

**Less than 10 years of service.** If your death occurs before retirement, and at the time of your death you have less than ten years of creditable service, a lump-sum refund of your contributions and interest will be paid to your primary beneficiary. If your primary beneficiary(ies) has predeceased you, the lump-sum refund will be made to any surviving secondary beneficiary(ies). If all of your primary and secondary beneficiaries have predeceased you, a refund of your accumulated contributions and interest will be made to your estate. In the event that you have not designated a beneficiary and you have a surviving spouse, the refund will be made to your surviving spouse.

**10 or more years of service.** In the event of your death before retirement, and if you have at least ten years of creditable service, your beneficiary(ies) has a choice of either a monthly benefit for life or a lump-sum refund of your contributions and interest. The monthly benefit payable to the beneficiary of an active member who dies while in active service is the same benefit that would have been payable if the deceased member had retired and selected Plan B, Option 2 (the 100% survivorship option).

If only one primary beneficiary is designated and still living at the time of the active member's death, that individual would receive the entire available benefit. If you have designated more than one primary beneficiary, the lump-sum refund of your account will be divided equally among those named, unless you have designated a percentage to be paid to each beneficiary. If there are no surviving primary beneficiaries, the secondary beneficiary(ies) has the same option to a monthly benefit for life as the primary beneficiary(ies).

I have read and understand the important information as outlined by the Teachers Retirement System of Georgia.

At the bottom of the page, there are "Cancel" and "Next" buttons. The Windows taskbar at the bottom shows the time as 2:41 PM on 11/19/2020.

**7. Click Edit for Each Beneficiary to update existing persons on file or click Add a New Beneficiary for a new individual.**  
**Note – you will need the social security, date of birth, address and phone number of the person you are trying to add.**  
**You will not be able to save the individual’s information without completing these fields.**

The screenshot shows the 'Maintain Your Beneficiary Designation(s)' page. At the top is the Teachers Retirement System of Georgia logo and navigation links: 'My Accounts', 'Account Desktop', and 'I Want To...'. Below the header is a blue box with instructions: 'Below is a summary of the beneficiary designations we currently have on file for you. If you wish to edit and/or delete your beneficiary information, please click the box next to Update Beneficiary information. If you wish to add either a primary or secondary beneficiary, please click the Add a Beneficiary button. If you wish to print a copy of your beneficiary information, please click on the "View in printable form" link. Please type in the distribution percentage amount for your beneficiary(ies). The numbers you enter must total 100% for your primary and 100% for your secondary beneficiary(ies). PLEASE NOTE: Any changes you make at this time will immediately replace the beneficiary information you have on file with TRS.'

There are two tables: 'Primary Beneficiaries' and 'Secondary Beneficiaries'. Each table has columns for Beneficiary Name, SSN, Date of Birth, Distribution %, Actions, and Status. The 'Distribution %' column contains a text input field with '100'. The 'Actions' column contains 'Edit' and 'Delete' buttons. The 'Status' column contains 'Current'. Below the tables are links for 'View in printable form' and 'Add a New Beneficiary'.

**8. Enter required information for each individual.**

The screenshot shows the 'TRS Beneficiary Add/Edit' form. It includes a red asterisk icon and the text '\* indicates required field.' The form fields are: Beneficiary Type (dropdown menu with 'Primary' selected), Relationship (dropdown menu with 'SPOUSE' selected), Title (dropdown menu), First Name, Middle Initial, Last Name, Suffix (dropdown menu), Social Security Number, Birth Date, Gender (dropdown menu with 'Male' selected), 'Does the Beneficiary reside at the same location as you?:' (checkbox), Contact Phone, Address 1, Address 2, and International Address? (checkbox).

## 9. Click Save to submit the information entered.

The screenshot shows a web browser window with the URL `yankeep1/Member/BeneficiaryUpdate/BeneficiariesList`. The page header features the Teachers Retirement System of Georgia logo and navigation links: **My Accounts**, **Account Desktop**, and **I Want To...**.

The main content area contains two tables for beneficiary management:

Beneficiary Name	SSN	Date of Birth	Distribution %	Actions	Status
			100	Edit Delete	Current

Below this is a section for **Secondary Beneficiaries** with an identical table structure and one row of data.

At the bottom of the form area, there are buttons for **Cancel**, **Save**, and **Add a New Beneficiary**. A link for **View in printable form** is also present.

The footer contains a **QUICK LINKS** section with buttons for **Home**, **Active Members**, **Retirees**, and **Employers**. Below this are links for **CONTACT US**, **CAREERS**, **REPORT A DEATH**, **REPORT FRAUD**, and **PRIVACY POLICY**. The footer also includes the copyright notice: **© 2002-2020 Teachers Retirement System of Georgia. All Rights Reserved. Serving Georgia's Educators**.

The Windows taskbar at the bottom shows the system time as 2:44 PM on 11/19/2020.