

# Designate Your Beneficiaries Online

Fill out the beneficiary designation section to tell Trust Point who you would like to inherit the money from your 401(k) in the event of your passing. You may designate one or more person(s) as your beneficiary. This does not have to be a family member. The total balance will be split equally among your named beneficiaries unless otherwise indicated.

As your situation changes and life events occur, make sure to review your beneficiaries and keep them updated.

## Primary Beneficiary

Your primary beneficiary is the person(s) who would receive your money first. If you are married, the sole primary beneficiary must be your spouse. Naming anyone else will be considered void, unless prior consent is received by your spouse. A Beneficiary Designation form must be signed and notarized, then given to your HR department or emailed to Trust Point at [retirementplanservices@trustpointinc.com](mailto:retirementplanservices@trustpointinc.com).

## Contingent Beneficiary

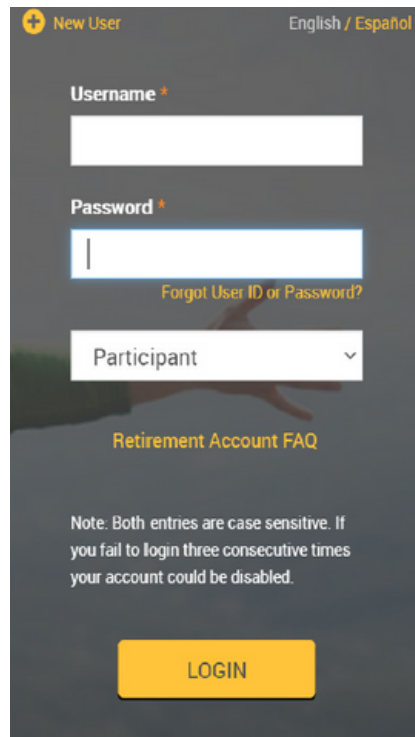
Your contingent beneficiary is the person(s) who would receive your money if your primary beneficiary predeceased you and you did not name a different primary beneficiary.



# Add or Update Your Beneficiary Information

1. Visit <https://www.accountplanaccess.net/trustpoint/> to get started.
2. Enter your Username and Password.

Please refer to your Enrollment Guide for additional login information. If you need further assistance, please contact our Retirement Plan Services Team.

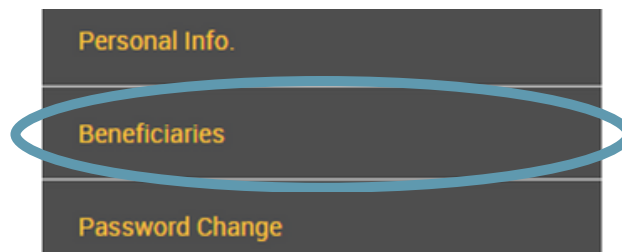


The screenshot shows a mobile application interface for a new user. At the top left, there is a plus sign icon and the text "New User". At the top right, it says "English / Español". Below this, there are three input fields: "Username \*", "Password \*", and a dropdown menu labeled "Participant". Below the password field is a link that says "Forgot User ID or Password?". Below the dropdown menu is a link that says "Retirement Account FAQ". At the bottom, there is a yellow button labeled "LOGIN". A note at the bottom of the form reads: "Note: Both entries are case sensitive. If you fail to login three consecutive times your account could be disabled."

3. A one-time PIN will be required.
4. Once logged in, click on the settings symbol on the top right of the screen.



5. Then, select 'Beneficiaries'.



6. Complete the 'Beneficiary Designation 1' section. Be sure to select both your 'Beneficiary type' and 'Beneficiary percent'.

**NOTE: At least one primary beneficiary is required, but you may choose up to four primary beneficiaries. Zero contingent beneficiaries are required; however, you may choose up to five contingent beneficiaries.**



Beneficiaries

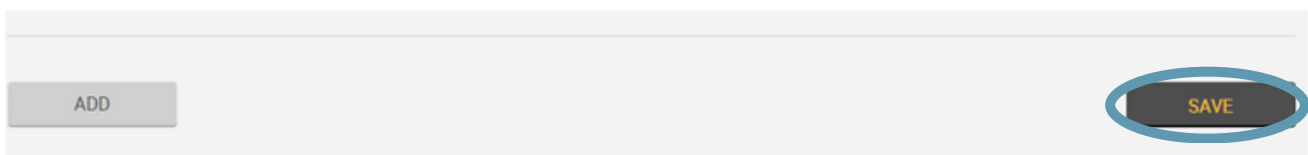
Beneficiary Designation 1

Items marked with asterisk (\*) must be completed before you can proceed to the next step.

Beneficiary type  Beneficiary percent \*

If you want to add a contingent beneficiary (or add multiple primary beneficiaries), click 'ADD'.

7. Once you have added your beneficiary information, click 'SAVE'.



ADD SAVE

**Please contact the Retirement Plan Services team by calling 800-458-9111 or emailing [retirementplanservices@trustpointinc.com](mailto:retirementplanservices@trustpointinc.com) if you have questions or need additional assistance.**