

**NEENAH JOINT SCHOOL DISTRICT
OTHER POST EMPLOYMENT BENEFIT STIPEND
BENEFICIARY DESIGNATION
EFFECTIVE July 1, 2015**

Please complete this Beneficiary Designation form identifying Primary and, if desired, Contingent Beneficiary(ies).

Upon the death of an eligible Neenah Joint School District retiree, their designated Beneficiary(ies) would be asked to open a 403b Tax Sheltered Account with Associated Wealth Management. Once that account is activated the beneficiary would receive the remaining benefit in the same manner as the retiree. The Neenah Joint School District OPEB Retirement Stipend would be deposited annually, over the remainder of the five and one half years benefit, into the Beneficiary's Tax Sheltered 403b Account.

If no beneficiary designation is on file with the Neenah Joint School District, at the time of a retiree's death, any proceeds would be payable to the retiree's estate.

Retiree's Name **Date of Retirement**

I hereby request the benefits payable for loss of life to be issued as follows: (If more room is needed to list beneficiaries, please do so on the back of this document.)

Primary Beneficiary(ies):

Name in Full	Social Security #	Address	Percentage

Contingent Beneficiary(ies):

Name in Full	Social Security #	Address	Percentage

Except as otherwise directed herein, the death benefit of said Retirement Stipend shall be divided equally among all surviving persons who are named as Primary Beneficiaries, but if no Primary Beneficiary survives the Retiree, then among all surviving persons who are named as Contingent Beneficiaries.

_____ I hereby revoke all former beneficiary designations applicable to said Retirement Stipend, and reserve the right to make further changes at any time.

Signature of Retiree **Date of Signature**