



TRUST FOR THE INTERNATIONAL BROTHERHOOD OF ELECTRICAL WORKERS' PENSION BENEFIT FUND

900 Seventh Street, NW • Washington, DC 20001 • 202.833.7000

Lonnie R. Stephenson
Trustee

IBEW Pension Benefit Fund (PBF)

Kenneth W. Cooper
Trustee

Beneficiary Designation Form 124 Guidelines and Instructions

MEMBER MUST HAVE AT LEAST 6 MONTHS OR MORE “A” MEMBERSHIP TO QUALIFY FOR A PBF DEATH BENEFIT. IT IS THE RESPONSIBILITY OF THE “A” MEMBER TO DESIGNATE AND/OR MAKE CHANGES TO HIS/HER BENEFICIARY DESIGNATIONS DUE TO LIFE EVENTS (e.g. marriage, divorce, death of a beneficiary, etc.)

1. PLEASE READ THE FOLLOWING BEFORE COMPLETING THE FORM:

Article XI of the *IBEW Constitution* states that the death benefit is automatically payable to the following individual(s) if no other beneficiary is designated.

- Member's spouse, or if none;
- Member's children in equal shares, or if none;
- Member's parents in equal shares, or if none;
- Member's estate

If the above order of priority is satisfactory to the member, it is not necessary to complete a beneficiary designation form; however, if a member wishes to specifically name a beneficiary or change the beneficiary previously elected, he/she must complete a new beneficiary designation form. It is preferred that the form be completed online and printed for the member's and notary/local union signature. However, if member is unable to complete the form online, he/she must use ink and print legibly.

The form will not be accepted if it is not legible or contains erasures/whiteout.

2. REVIEW THE FOLLOWING BEFORE SUBMITTING THE FORM:

- Member must name at least one primary beneficiary before selecting any contingent beneficiaries.
- Each form must be signed and dated by the member **only**, even in cases of those appointed Power of Attorney (POA) or Guardian/Conservator.
- A local union official or notary **MUST WITNESS** the signature of member, sign, date, and stamp/seal designated space.

3. FORWARD COMPLETED FORMS TO:

IBEW PBF
900 7th Street NW
Washington, DC 20001

Email: Pension@IBEW.org

Fax: (202)728-6138

Effective November 2018, PBF will begin accepting clear, legible copies of beneficiary designation forms (Form 124), which may be mailed, faxed, or emailed to the PBF.

*Faxes/emails will only be accepted from local union offices and the stamp/seal **MUST** be visible.
Emailed forms must be PDF documents; .jpg will not be accepted.*

A confirmation letter indicating the beneficiary designation(s) will be mailed to the member's home address once the form has been processed.

BENEFICIARY DESIGNATION FORM - USA

For Death Benefits from the IBEW Pension Benefit Fund

Retired/Active "A" Members of the IBEW

Section A: Member's Information

<input type="checkbox"/> MR	First Name	MI	Last Name
<input type="checkbox"/> MS			
<input type="checkbox"/> MRS	Local Union	Card Number	Social Security Number
	E-Mail		

Section B: Beneficiary Information

If naming an individual, please complete this section and if you need additional beneficiaries attach Form No.124C.

<input type="checkbox"/> MR	First Name	MI	Last Name
<input type="checkbox"/> MS			
<input type="checkbox"/> MRS	Relationship		Choose One: <input type="checkbox"/> Primary <input type="checkbox"/> Contingent
<input type="checkbox"/> MR	First Name	MI	Last Name
<input type="checkbox"/> MS			
<input type="checkbox"/> MRS	Relationship		Choose One: <input type="checkbox"/> Primary <input type="checkbox"/> Contingent
<input type="checkbox"/> MR	First Name	MI	Last Name
<input type="checkbox"/> MS			
<input type="checkbox"/> MRS	Relationship		Choose One: <input type="checkbox"/> Primary <input type="checkbox"/> Contingent

If naming an organization or trust, please complete this section

Choose One:
☐ Primary ☐ Contingent

Name of Organization, Institution or Trust		
Address (Street & Number)		
City	State	Zip Code+4

Today's Date (MM/DD/YYYY)

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Today's Date (MM/DD/YYYY)

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Notary or LU Seal

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Member's Signature

Notary or Local Union Official's Signature

Printed Name and Title of LU Official or Notary

Mail Completed Form to:
IBEW
900 7th Street, NW
Washington, DC 20001
Attn: Pension & Death Claims Dept

