How to Update Your Beneficiaries (online)

Log-in to your account at https://participant.johnsonfinancialgroup.com
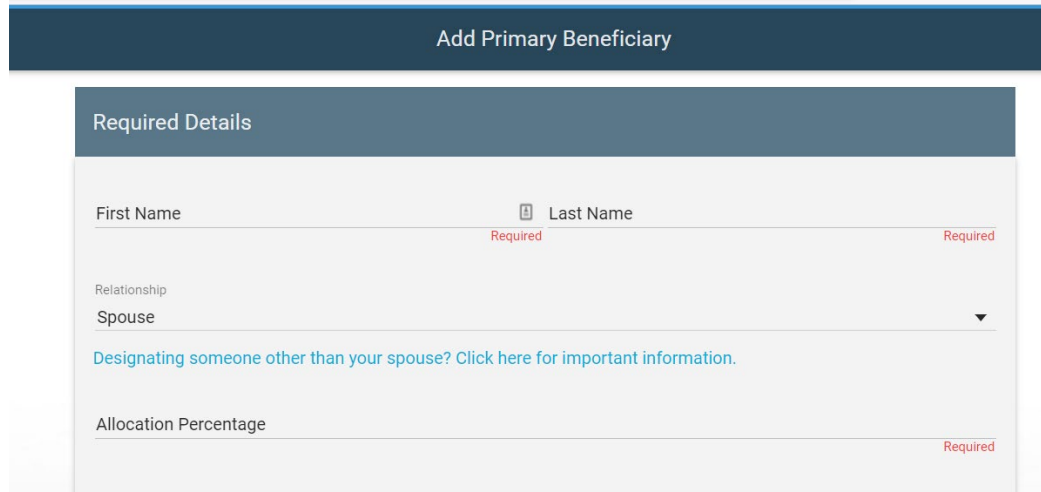
From the Dashboard Summary > Select Settings Gear Icon in Top Right Corner

JOHNSON FINANCIAL GROUP®

Good Afternoon, Penny T Money
Last Login: May 10, 2022 1:57 PM EST

Dashboard   Manage   Performance   Loans & Withdrawals   Forms & Reports   Contact Us   Disclosures   Financial Wellness   Plan Selection

My Dashboard

Print
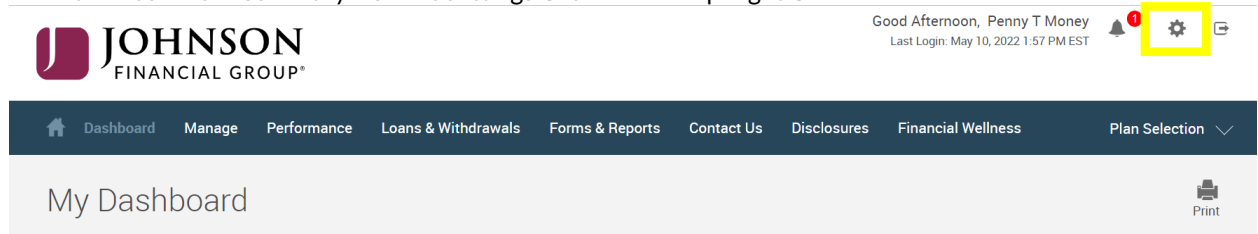
From Drop Down Menu > Select Beneficiaries

JOHNSON FINANCIAL GROUP®

Good Afterno
Last Login: M

Penny Money

Dashboard   Manage   Performance   Loans & Withdrawals   Forms & Reports   Contact Us   Disclosures   Financial

Personal Info.

My Dashboard
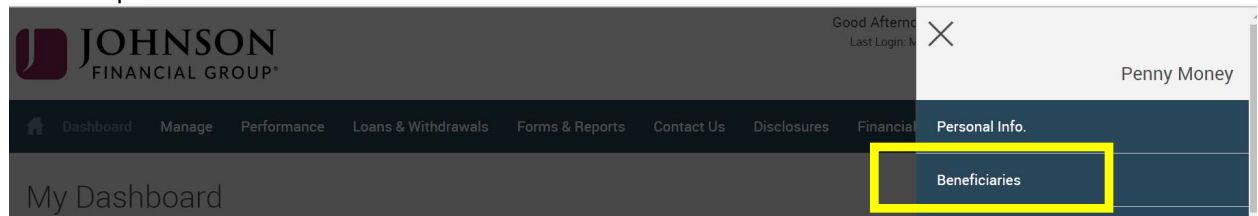
Beneficiaries
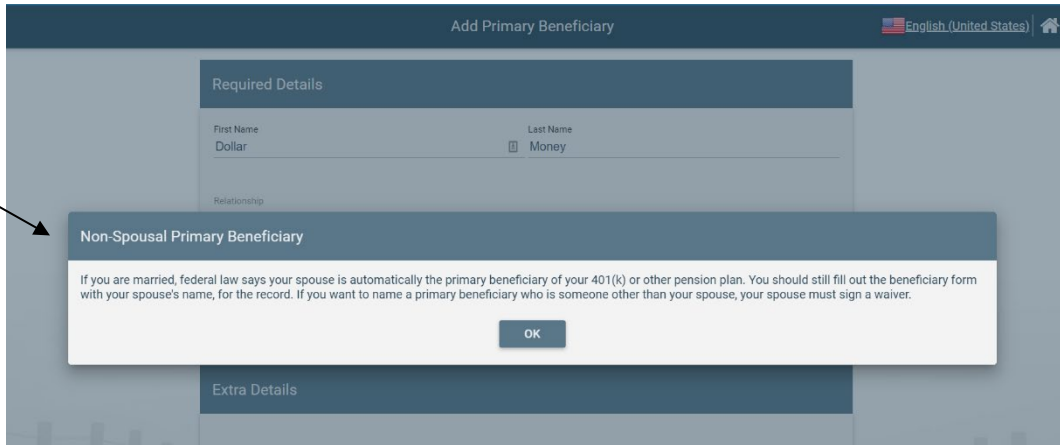
Add Primary Beneficiary > **Note** Federal Rules for Non-Spousal Designation (if married) > Click Submit

Add Primary Beneficiary

Required Details
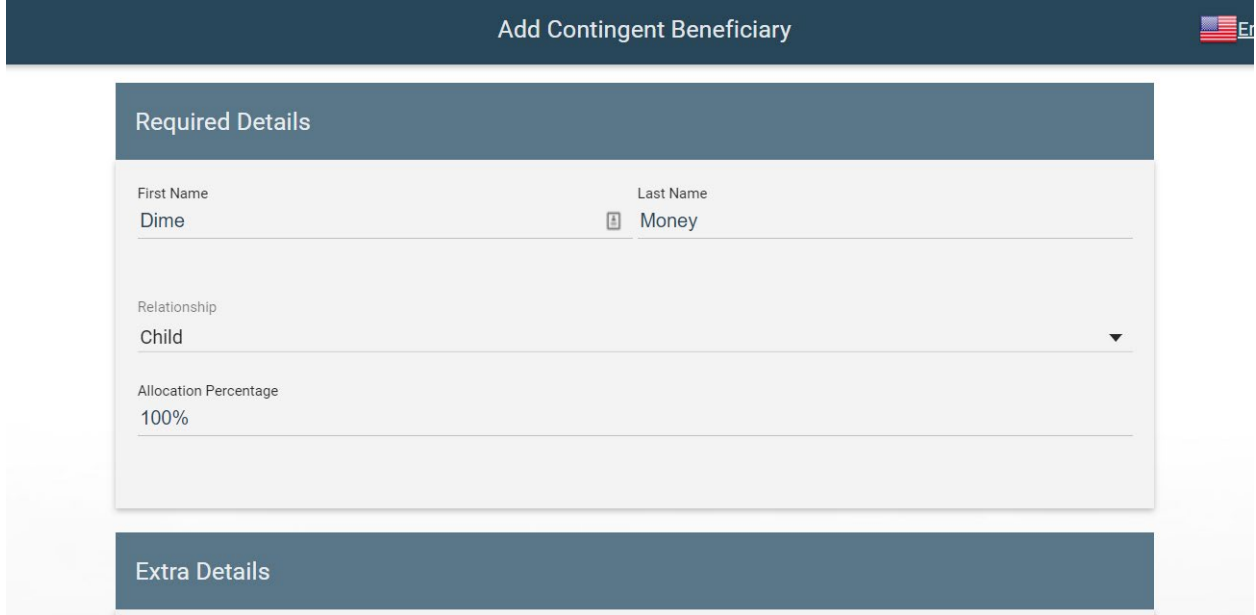
First Name   Last Name
                Required   Required

Relationship
Spouse

Designating someone other than your spouse? Click here for important information.

Allocation Percentage
                                          Required

Add Contingent Beneficiary (if desired) > Click Submit

You will receive a GREEN Confirmation Code

All changes require an overnight cycle to appear online and will be processed as soon as administratively feasible in accordance with your plan provisions.

Read Summary Plan Description (located in Forms) for more information

Please contact the Participant Support Center at 1.888.755.3039 with any questions