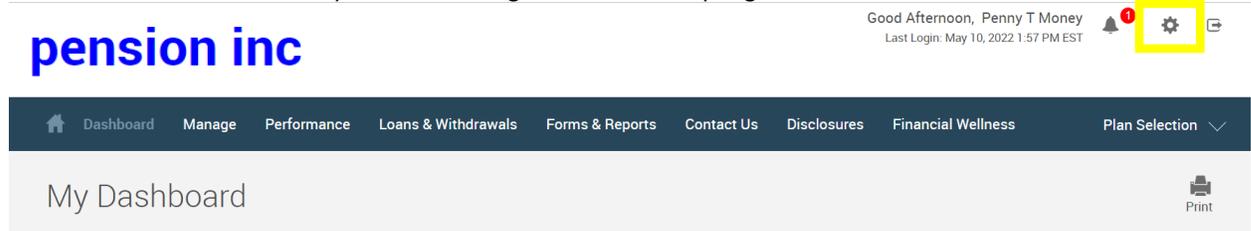


## How to Update Your Beneficiaries (online)

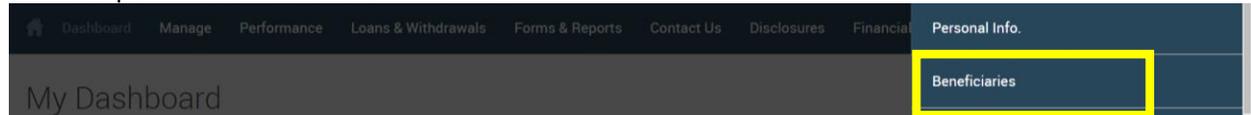
Log-in to your account at [www.yourbenefitaccount.net/pensioninc/](http://www.yourbenefitaccount.net/pensioninc/) or [www.pensioninc.net](http://www.pensioninc.net)

From the Dashboard Summary > Select Settings Gear Icon in Top Right Corner



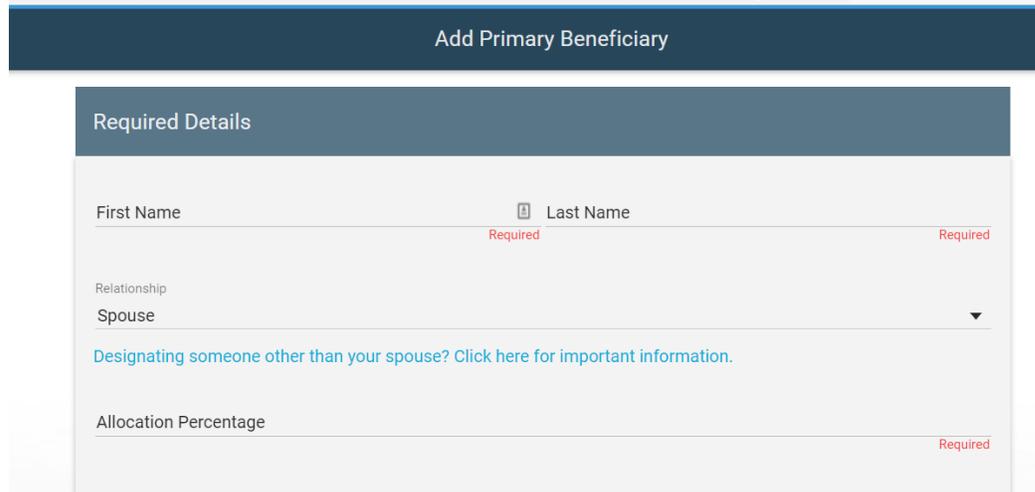
The screenshot shows the 'pension inc' dashboard. At the top right, the user's name 'Good Afternoon, Penny T Money' and last login 'May 10, 2022 1:57 PM EST' are displayed. A settings gear icon is highlighted with a yellow box. Below the header is a navigation menu with items: Dashboard, Manage, Performance, Loans & Withdrawals, Forms & Reports, Contact Us, Disclosures, Financial Wellness, and Plan Selection. The main content area shows 'My Dashboard' and a 'Print' icon.

From Drop Down Menu > Select Beneficiaries



The screenshot shows the 'Personal Info.' dropdown menu open. The 'Beneficiaries' option is highlighted with a yellow box. The navigation menu and 'My Dashboard' text are visible in the background.

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



The screenshot shows the 'Add Primary Beneficiary' form. The form has a dark blue header with the text 'Add Primary Beneficiary'. Below the header is a section titled 'Required Details' with the following fields:

First Name	Last Name
Relationship	
Designating someone other than your spouse? <a href="#">Click here for important information.</a>	
Allocation Percentage	

Red 'Required' text is placed below the First Name, Last Name, and Allocation Percentage fields. The Relationship field is a dropdown menu currently set to 'Spouse'.

Add Primary Beneficiary English (United States)

**Required Details**

First Name: Dollar  
Last Name: Money

Relationship:   
  Spousal Primary Beneficiary   
  **Non-Spousal Primary Beneficiary**

If you are married, federal law says your spouse is automatically the primary beneficiary of your 401(k) or other pension plan. You should still fill out the beneficiary form with your spouse's name, for the record. If you want to name a primary beneficiary who is someone other than your spouse, your spouse must sign a waiver.

OK

**Extra Details**

Add Contingent Beneficiary (if desired) > Click Submit

Add Contingent Beneficiary English (United States)

**Required Details**

First Name: Dime  
Last Name: Money

Relationship: Child

Allocation Percentage: 100%

**Extra Details**

You will receive a **GREEN** Confirmation Code

Beneficiaries Print

**IMPORTANT NOTE:**

If you are married, your spouse is automatically your designated primary beneficiary unless you elect otherwise and your spouse consents to such election. If you are designating someone other than your spouse as a primary beneficiary, then you must complete the [Beneficiary Designation Form](#) (making such a designation online is not an option).

✔ Your changes have been saved.

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 1.920.432.7020 or 1.877.865.7899 with any questions*