

Selection of Option Plan upon Marriage or Remarriage



If marriage or remarriage occurs after a member retires or enters DROP on or after May 11, 2018, there is no established surviving spouse benefit. The retiree will have the option of changing to a Joint and Survivor Annuity to provide benefits to the spouse by completing this form.

Section 1 – Member Information

Last Name		First Name	Middle Initial
Street Address			
City		State	Zip Code
SSN	DOB	Home Phone	
Email Address		Cell Phone	
Marital Status		Date of Marriage	

Section 2 – Payment Plan Selection

A surviving spouse may be eligible to receive a survivor benefit depending on the member's retirement date. Any combination of payments made to a surviving spouse and/or any other beneficiary selected under the **Joint and Survivor Annuity** cannot exceed the pension amount the retirant was receiving at the time of death.

Joint and Survivor Annuity

Copies of member and beneficiary birth certificates are required. Copy of marriage certificate is required if member and beneficiary are married.

I authorize HPRS to pay my service retirement pension on the basis of the joint and survivor annuity payment plan I have selected.

I agree to accept a reduced monthly pension so that upon my death _____, whom I nominate as my beneficiary, whose relationship to me is that of _____, and whose Social Security number is _____, will be entitled to receive a lifetime monthly allowance equal to _____ percent of my reduced monthly pension amount.

I understand that this selection cannot be changed except as follows:

- (1) If within ONE year of receiving a retirement pension OR if my marriage to the beneficiary ends, I understand that with the written consent of the beneficiary, I can cancel this plan and convert to the Single Life Annuity plan which pays me the highest monthly allowance I am entitled to receive.*
- (2) If I marry after retirement, I can cancel this plan if I am not married to the beneficiary and re-select a Joint and Survivor Annuity plan naming my spouse beneficiary.*

The Joint and Survivor Annuity plan is automatically canceled by law and the pension payment converts to the Single Life Annuity plan upon of named beneficiary and submission of a death certificate to the HPRS.

Section 3 – Acknowledgement and Signatures

▶	Member's Signature	Date
▶	Beneficiary's Signature	Date