

Life Insurance and Long-Term Disability Form for *Christian Brothers Employee Benefits Trust*

☛ please print or type.

Location Name _____ Location ID No. _____

Employee's Name _____
Last Name First Name Middle Initial

Employee's Address _____
Street City State Zip Code

Social Security Number _____ Date of Birth _____

Occupation _____ First Day of Work _____

Annual Salary \$ _____

ENROLLMENT DEPARTMENT USE ONLY

Effective Date of Coverage _____

Male Female Single Married Widowed Divorced

Beneficiary Information

☛ Please note: This form cannot be used to change the beneficiary information. Please complete a *Change in Beneficiary* form.

Beneficiary (**Give full name and relationship to the insured**) See Back of form for common beneficiary designations. _____

Unless otherwise provided herein, if two or more beneficiaries are named, the proceeds shall be paid in equal shares to the named beneficiaries surviving the member.

Signature of Employee _____ Date _____

Popular Beneficiary Designations

Be sure to use given names such as “Mary M. Doe”, not Mrs. John Doe”. The following sample designations may be helpful to you.

| <u>Type of Beneficiary</u> | <u>Standard Wording</u> |
|---|--|
| 1. insured’s estate | my estate |
| 2. one beneficiary | Anna L. Doe, wife |
| 3. two beneficiaries | John A. Doe, father, and Mary I. Doe, mother, equally or to the survivor |
| 4. three or more beneficiaries | John A. Doe, father, and Mary I. Doe, mother, and Henry J. Doe, son, equally or to the survivors or survivor |
| 5. one beneficiary and one contingent beneficiary | Anna L. Doe, wife, if living; otherwise, Henry J. Doe, son |
| 6. one beneficiary and two or more contingent beneficiaries | Anna L. Doe, wife, if living; otherwise, Henry J. Doe, son, Alice G. Doe, daughter, equally or to the survivor |
| 7. one beneficiary and three or more contingent beneficiaries | Anna L. Doe, wife, if living; otherwise, Henry J. Doe, Alice G. Doe and Charles B. Doe, children, equally or to the survivors or survivor |
| 8. two beneficiaries and one contingent beneficiary | John A. Doe, father, and Mary I. Doe, mother, equally or to the survivor; otherwise, Anna L. Doe, wife |
| 9. two beneficiaries in unequal portions | three-quarters (3/4) of the proceeds to John A Doe, father, if living, and one-quarter (1/4) to Anna L. Doe, mother, if living, the share of a deceased beneficiary to be paid to the survivor, if any |
| 10. trust with individual trustees | Richard Doe and John Smith, trustees, or a successor in trust under (trust name) established (date of trust agreement) |
| 11. present or living trust | ABC Bank and Trust Company, Des Moines, Iowa, trustee or successor in trust under (trust name) established (date of trust agreement), provided however that the company has received within 180 days of the death of the insured, evidence satisfactory to the existence of such trust; otherwise to the estate of the insured |
| 12. testamentary trust | Trustee of the Mary I. Doe trust or successor in trust established by the last will and testament of the insured dated _____ |
| 13. minor beneficiaries | When either the primary or contingent beneficiary designation includes one or more minor children, you need to complete an additional form, beneficiary designation with UTMA custodian. Please contact CBEBBS for this form |