



The Building Trades United Pension  
Trust Fund - Milwaukee & Vicinity


## FUND REGISTRATION FORM FOR BENEFICIARY DESIGNATION

**Please note that BOTH SIDES of this form must be completed**

Return completed form to:

PO Box 530 • 500 Elm Grove Road, Room 300 • Elm Grove, WI 53122-0530  
(262)784-7880 or (800)433-8570

### PARTICIPANT INFORMATION:

Last Name	First Name	MI	Social Security Number	
Address	City, State, Zip		Phone Number	
Date of Birth	<b>Marital Status</b> <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Married <input type="checkbox"/> Widowed	<b>Sex</b> <input type="checkbox"/> Male <input type="checkbox"/> Female	Trade	Local Number
Signature  <b>(BENEFICIARY DESIGNATIONS ARE NOT VALID WITHOUT YOUR SIGNATURE.)</b>			Date	

### SPOUSE'S INFORMATION (IF MARRIED):

Last Name	First Name	MI	Date of Birth
Social Security Number			Date of Marriage

### PRIMARY BENEFICIARY(IES) FOR DEATH BENEFIT:

*(Please name the person or persons you wish to be the beneficiary(ies) for any Death Benefit that may be payable from the Pension Fund in the event of your death. If you list more than one primary beneficiary, the total designation must equal 100%. Please use whole percentages only. If no percentages are specified, the proceeds will be divided equally among your designated beneficiaries. If you wish to name more than 3 primary beneficiaries, please attach a separate sheet with the required information.)*

Primary Beneficiary's Name and Address	Relationship to You	Date of Birth	Percentage (Total must equal 100%)
Name Address City, State & Zip			
Name Address City, State & Zip			
Name Address City, State & Zip			

### SECONDARY BENEFICIARY(IES) FOR DEATH BENEFIT:

*(Secondary beneficiaries will only receive a benefit if there are no surviving primary beneficiaries.)*

Secondary Beneficiary's Name and Address	Relationship to You	Date of Birth	Percentage (Total must equal 100%)
Name Address City, State & Zip			
Name Address City, State & Zip			
Name Address City, State & Zip			

**The beneficiary(ies) listed on this side are for any DEATH BENEFIT that may be payable following your death. Be sure to complete the reverse side of this form to designate your beneficiary(ies) for any PRE-RETIREMENT SURVIVOR BENEFIT that may be payable following your death.**



If you are married and there is a Pre-Retirement Survivor Benefit payable following your death, it is automatically paid to your spouse, regardless of whom you name as beneficiary(ies) for this benefit. If you are not married, and do not name a beneficiary(ies) for Pre-Retirement Survivor Benefits, it will be paid to whomever you have named as Death Benefit beneficiary(ies).

If you wish to name the same Primary and Secondary beneficiary(ies) for the Pre-Retirement Survivor Benefit as you have listed for the Death Benefit, please check and initial here:  \_\_\_\_\_

Initials

### PRIMARY BENEFICIARY(IES) FOR PRE-RETIREMENT SURVIVOR BENEFIT

(Please name the person or persons you wish to be the beneficiary(ies) for any Pre-Retirement Survivor Benefit that may be payable from the Pension Fund in the event of your death. If you list more than one primary beneficiary, the total designation must equal 100%. Please use whole percentages only. If no percentages are specified, the proceeds will be divided equally among your designated beneficiaries. If you wish to name more than 3 primary beneficiaries, please attach a separate sheet with the required information.)

Primary Beneficiary's Name and Address	Relationship to You	Date of Birth	Percentage (Total must equal 100%)
Name			
Address			
City, State & Zip			
Name			
Address			
City, State & Zip			
Name			
Address			
City, State & Zip			

### SECONDARY BENEFICIARY(IES) FOR PRE-RETIREMENT SURVIVOR BENEFIT

(Secondary beneficiaries will only receive a benefit if there are no surviving primary beneficiaries.)

Secondary Beneficiary's Name and Address	Relationship to You	Date of Birth	Percentage (Total must equal 100%)
Name			
Address			
City, State & Zip			
Name			
Address			
City, State & Zip			
Name			
Address			
City, State & Zip			

#### Additional Information Regarding Naming a Beneficiary:

- If you should die without naming a beneficiary, and there is a lump sum Death Benefit payable, it will be paid to the first of those who survive you in the following order: your spouse; your surviving children and descendants of your deceased children; your parents; your brothers and sisters. If none of these survive you, the Death Benefit will be paid to the administrator or executor of your estate or according to Wisconsin statutes, in the discretion of the Trustees.
- If you are married, your beneficiary for any Pre-Retirement Survivor Benefit that may be payable is automatically your surviving spouse. If you are not married and die without designating a Pre-Retirement Survivor beneficiary, any benefit payable will go to the person(s) you named as your Death Benefit beneficiary(ies). If you have not named a Death Benefit beneficiary(ies), or your named beneficiary(ies) pre-deceases you, the Survivor Benefit will be paid to the first of those who survive you in the following order: your surviving children and descendants of your deceased children; your parents; your brothers and sisters. If none of these survive you, the Death Benefit will be paid to the administrator or executor of your estate or according to Wisconsin statutes, at the discretion of the Trustees.
- If your spouse is named as your Death Benefit beneficiary, and you divorce, the beneficiary designation is cancelled on the date of divorce. If you want your ex-spouse to remain as beneficiary, a new Pension Fund Registration Form must be completed after the divorce to re-designate your ex-spouse as your beneficiary for Death Benefits.
- You may designate your Estate or a Trust as your beneficiary. Indicate "My Estate" or "John Doe, Irrevocable Trust dated MM/DD/YYYY" as the beneficiary.