



STATE OF CONNECTICUT
 TEACHERS' RETIREMENT BOARD
 765 ASYLUM AVENUE HARTFORD, CT 06105-2822
 Toll-Free 1-800-504-1102 (860) 241-8400 Fax (860) 241-9295 www.ct.gov/trb

ACTIVE/INACTIVE TEACHER BENEFICIARY FORM

Refer to our [Survivorship Benefits Before Retirement Bulletin](#) before completing this form (survivorship benefits are not available to survivors of inactive members). This form should include a complete list of all beneficiaries; the beneficiary designation on this form will replace any previous beneficiary designation. Contact this office if you need assistance.

Section 10-183(h) of the Connecticut General Statutes requires that monthly survivor benefits be paid to the statutory survivors of members who die while active before any balance is paid to your designated beneficiary. This is true regardless of whom you designated as your beneficiary. Statutory survivors include but are not limited to a spouse or civil union partner and/or minor children under the age of 18.

- Include a complete list of all beneficiaries.
- Type or print clearly in ink and do not use white out.
- Do not submit an amended copy of a previous beneficiary form.
- You may name any living person, your estate, a trust, or a charitable organization as your beneficiary.
- At least one primary beneficiary must be named. If more than one primary beneficiary is named, the share of any beneficiary who dies before you shall be divided equally among the surviving primary beneficiaries.
- A payment is made to a contingent beneficiary(ies) only if all primary beneficiaries die before you do.
- If you survive all of the beneficiaries named, payment would be issued to your estate.
- "Per Stirpes" designations (unnamed or unborn beneficiaries) are not accepted.
- All information must appear in the appropriate section of this form.
- To designate a trust as a beneficiary enter the name and date of the trust agreement in the Beneficiary section of this form; leave the Relationship and Social Security sections of this form blank; and indicate Primary or Contingent.
- To designate your estate as a beneficiary enter the word "Estate" in the Beneficiary section of this form; leave the Relationship and Social Security sections of the form blank; and indicate Primary or Contingent.
- Review your CTRB Member Annual Statement to verify your designated beneficiary election on our records.

MEMBER NAME (FIRST NAME, MIDDLE INITIAL, LAST NAME)		SOCIAL SECURITY NUMBER	
STREET ADDRESS		E-MAIL ADDRESS	
CITY, STATE, ZIP		LOCAL SCHOOL DISTRICT	
NEW MEMBERS AND ACTIVE MEMBERS: All demographic changes/corrections (name, address, date of birth or social security number) must be submitted directly to your <i>employer</i> . The Local School District will then transmit the updated information electronically via their next monthly transmittal to CTRB.		INACTIVE MEMBERS (ONLY): NEW ADDRESS <input type="checkbox"/> NAME CHANGE <input type="checkbox"/>	
BENEFICIARY NAME (FIRST, MI, LAST)	RELATIONSHIP	SOCIAL SECURITY #	(CHECK ONE) <input type="checkbox"/> PRIMARY <input type="checkbox"/> CONTINGENT
BENEFICIARY NAME (FIRST, MI, LAST)	RELATIONSHIP	SOCIAL SECURITY #	(CHECK ONE) <input type="checkbox"/> PRIMARY <input type="checkbox"/> CONTINGENT
BENEFICIARY NAME (FIRST, MI, LAST)	RELATIONSHIP	SOCIAL SECURITY #	(CHECK ONE) <input type="checkbox"/> PRIMARY <input type="checkbox"/> CONTINGENT
BENEFICIARY NAME (FIRST, MI, LAST)	RELATIONSHIP	SOCIAL SECURITY #	(CHECK ONE) <input type="checkbox"/> PRIMARY <input type="checkbox"/> CONTINGENT
Use additional Active/Inactive Teacher Beneficiary forms to designate additional beneficiaries.			
SIGNATURE OF MEMBER		DATE	

CTRb does not acknowledge the receipt of individual forms. Please retain a copy of this form for your records and forward it by fax or regular mail directly to CTRb at the address above.



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SURVIVORSHIP BENEFITS BEFORE RETIREMENT

If you die while in active service or while receiving a CTRB Disability Allowance, this system provides for benefits to your statutory survivors. A statutory survivor is defined as a spouse or civil union partner (CUP) and/or a minor child under the age of 18. Connecticut statutes require that monthly survivorship benefits be paid to your statutory survivors before any balance of your account is paid to your designated beneficiary. If you have no statutory survivors, your account balances will be paid to your designated beneficiary in a lump sum payment.

Statutory Survivorship Benefits are as follows:

- \$300 monthly to each minor child under age 18.
- \$300 monthly to each disabled child.
- \$300 - \$600 monthly to surviving spouse or CUP (\$300 plus \$25 for each year of service over twelve to a maximum of \$600).

The maximum family survivorship benefit is \$1,500 monthly.

A one-time burial expense payment of up to \$2,000 maximum (dependent on length of service) will be paid to your surviving spouse or CUP. If there is no surviving spouse or CUP, such payment will be issued to the person who paid the funeral expenses.

If you die after meeting the age and service requirements for a retirement benefit, your spouse or CUP as your sole designated beneficiary, or where all other designated beneficiaries relinquish all claim to any amounts that may be due them from the system, may choose one of the following options in the settlement of the account:

- Monthly Survivorship Benefit (plus the one-time lump sum death payment).
- Monthly Plan D 100% Co-participant Benefit (this benefit is based on the retirement allowance you would have received at the time of your death, reduced by an option factor based on your age and your spouse or CUP's age for this option).
- Refund of your account balances in a lump sum.

If the designated beneficiary is anyone other than the spouse or CUP (i.e. Trust, Estate or any other person), we are required by law to issue monthly survivorship benefits to the survivor(s). The Plan D 100% Co-participant Benefit Option or Refund Option would not be available.

If you are an active teacher, you should review your CTRB Annual Member Statement to verify that your designated beneficiary election on our records is current.

Changes to your designated beneficiary election must be submitted directly to CTRB in writing on the proper form. Active or inactive teachers must file an [Active/Inactive Teacher Beneficiary Form](#). CTRB Disability Allowance recipients must file a [Beneficiary Election for Disability Allowance](#). Please retain a copy of the completed form for your records and forward it by fax or regular mail directly to CTRB at the address above.



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SURVIVORSHIP BENEFITS - SETTLEMENT INFORMATION

Active member or CTRB Disability Allowance recipient dies PRIOR to meeting retirement eligibility requirements:

Spouse?	Primary Beneficiary	Minor Children?	Settlement of Account
Yes	Spouse or Civil Union Partner	Yes	Surviving Spouse Benefit and Minor Child Benefit
Yes	Other	No	Surviving Spouse Benefit
Yes	Spouse or Civil Union Partner	No	Surviving Spouse Benefit or Lump Sum Payment
No	Children	Yes	Minor Child Benefit
No	Children	No	Lump Sum Payment to Beneficiary
No	Other	No	Lump Sum Payment to Beneficiary
No	Other	Yes	Minor Child Benefit

Active member or CTRB Disability Allowance recipient dies AFTER meeting retirement eligibility requirements:

Spouse ?	Primary Beneficiary	Minor Children?	Settlement of Account
Yes	Spouse or Civil Union Partner	Yes	Surviving Spouse Benefit or Lump Sum Payment or Plan D 100% Co-participant Benefit plus Minor Child Payment
Yes	Other	No	Surviving Spouse Benefit
Yes	Spouse or Civil Union Partner	No	Surviving Spouse Benefit or Lump Sum Payment or Plan D 100% Co-participant Benefit
No	Children	Yes	Minor Child Benefit
No	Children	No	Lump Sum Payment to Beneficiary
No	Other	No	Lump Sum Payment to Beneficiary
No	Other	Yes	Minor Child Benefit

Retirement Eligibility Requirements:

- 10 years of CT credited service at age 60 or over.
- 20 years of credited service at age 55 (minimum 15 in CT).
- 25 years of credited service any age (minimum 20 in CT).
- 35 years of credited service any age (minimum 25 in CT)