

Option Payee's Beneficiary Designation Instructions

Use this form if you are currently receiving a lifetime monthly benefit as the result of a deceased CalSTRS member having selected an option. As an option beneficiary payee, you may name a beneficiary, beneficiaries, or trust to receive, upon your death, any remaining contributions and unpaid accrued benefits in the retiree's account. Your beneficiary, beneficiaries or trust will not receive a monthly benefit.

IMPORTANT FACTS

A completed Option Payee's Beneficiary Designation form must be received and accepted by CalSTRS prior to your death to be valid.

The Option Payee's Beneficiary Designation form remains in effect until a new form is filed.

Designating a beneficiary, beneficiaries or trust is optional. If you do not submit a designation form, any benefits payable will be distributed to your estate.

If your designated primary beneficiary or beneficiaries predeceases you, any benefit due will be paid to your secondary beneficiary, beneficiaries or trust unless you file a new Option Payee's Beneficiary Designation form. If CalSTRS is unable to locate your designated beneficiary or beneficiaries, the benefit will be distributed to the best of our ability, according to the laws in existence at the time of your death.

PROCESSING

Valid forms will be processed and imaged. **Please retain a copy for your records.**

SEND YOUR COMPLETED FORMS TO:

CalSTRS
PO Box 15275, MS 43
Sacramento, CA 95851-0275

QUESTIONS

Go online to [CalSTRS.com/Contact](https://www.calstrs.com/Contact) or call us at 800-228-5453.

Option Payee's Beneficiary Designation Instructions Cont.

Print clearly in DARK INK or type all information requested. Forms with corrections or erasures will not be accepted.

SECTION 1 - DECEASED MEMBER INFORMATION

Enter the deceased member's full name and social security number or Client Identification (CID) number.

SECTION 2 - OPTION PAYEE'S INFORMATION

Enter your social security number, birth date, full name, telephone number and complete mailing address.

SECTION 3 & 4 - PRIMARY AND SECONDARY BENEFICIARY, BENEFICIARIES OR TRUST

You may name any living person, an estate, a trust, a corporation, a charitable or parochial institution or a public entity as your recipient or recipients.

Person or persons – Provide their social security number, full name, relationship, birth date, address and telephone number.

Estate – To designate your estate, enter the phrase "My Estate" instead of the beneficiary or beneficiaries' name or names. Upon your death, if your estate is not subject to probate, CalSTRS will pay benefits pursuant to California Probate Code 13050.

Trust – If you want a trust to be a payee, DO NOT list a beneficiary or beneficiaries. Enter the name of the trust, the trustee's address and the date the trust was created instead of a birth date. CalSTRS will contact the trustee and pay benefits to the trust. It is not necessary to provide the trust document at this time.

Organization – If you wish to designate an organization, enter the name, address of the organization and the organization's tax identification number.

SECTION 5 - ADDITIONAL BENEFICIARY OR BENEFICIARIES

To designate more beneficiaries, additional space is provided in Section 5 of the form. Indicate whether you are designating a primary or secondary beneficiary or beneficiaries by checking the appropriate box.

SECTION 6 - OPTION PAYEE'S SIGNATURE

The option payee's signature and date must be on the form to be valid.

Option Payee's Beneficiary Designation

SB-0816 (Rev. 06/11)

CALSTRS

California State Teachers' Retirement System
 PO Box 15275, MS 43
 Sacramento, CA 95851-0275
 800-228-5453
 CalSTRS.com

Use this form if you are currently receiving a lifetime monthly benefit as the result of a deceased CalSTRS member having selected an option. As an option beneficiary payee, you may name a primary beneficiary, beneficiaries or trust to receive, upon your death, any remaining contributions and unpaid accrued benefits in the retiree's account. Your beneficiary, beneficiaries or trust will not receive a monthly benefit. Also enclosed are Instructions to complete this form. Please read them carefully.

Section 1: Deceased Member Information

DECEASED MEMBER'S NAME (LAST, FIRST, INITIAL)

CLIENT IDENTIFICATION OR SOCIAL SECURITY NUMBER

Section 2: Option Payee Information

NAME (LAST, FIRST, INITIAL)

SOCIAL SECURITY NUMBER

MAILING ADDRESS

DATE OF BIRTH (MM/DD/YYYY)

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CITY

STATE

ZIP CODE

HOME TELEPHONE

I hereby revoke previous designation(s) and designate the following primary beneficiary, beneficiaries, or trust to share and share alike, unless otherwise specified herein, or the survivor or survivors among them, as beneficiary or beneficiaries for any benefit payable under the Teachers' Retirement Law at the time of my death. This form does not designate a beneficiary, beneficiaries or trust to receive a continuing retirement option benefit. In the event I survive the primary beneficiary or beneficiaries designated below, then I designate the following secondary beneficiary, beneficiaries or trust to share and share alike unless otherwise specified, or the survivor or survivors, as beneficiary or beneficiaries for any benefit payable under the Teachers Retirement Law at the time of my death. I further understand that should I survive all of my named beneficiaries, then any benefits payable at the time of my death under said law will be paid to my estate.

Section 3: Primary Beneficiary, Beneficiaries or Trust

NAME (LAST, FIRST, INITIAL)

SOCIAL SECURITY NUMBER

DATE OF BIRTH/TRUST DATE (MM/DD/YYYY)

RELATIONSHIP

TELEPHONE NUMBER

MAILING ADDRESS

CITY

STATE

ZIP CODE

NAME (LAST, FIRST, INITIAL)

SOCIAL SECURITY NUMBER

DATE OF BIRTH/TRUST DATE (MM/DD/YYYY)

RELATIONSHIP

TELEPHONE NUMBER

MAILING ADDRESS

CITY

STATE

ZIP CODE



SB816

Section 4: Secondary Beneficiary, Beneficiaries or Trust

NAME (LAST, FIRST, INITIAL)		SOCIAL SECURITY NUMBER	
DATE OF BIRTH/TRUST DATE (MM/DD/YYYY)	RELATIONSHIP	TELEPHONE NUMBER	
MAILING ADDRESS	CITY	STATE	ZIP CODE
NAME (LAST, FIRST, INITIAL)		SOCIAL SECURITY NUMBER	
DATE OF BIRTH/TRUST DATE (MM/DD/YYYY)	RELATIONSHIP	TELEPHONE NUMBER	
MAILING ADDRESS	CITY	STATE	ZIP CODE

Section 5: Additional Beneficiary or Beneficiaries primary or secondary

NAME (LAST, FIRST, INITIAL)		SOCIAL SECURITY NUMBER	
DATE OF BIRTH/TRUST DATE (MM/DD/YYYY)	RELATIONSHIP	TELEPHONE NUMBER	
MAILING ADDRESS	CITY	STATE	ZIP CODE

Additional Beneficiary or Beneficiaries primary or secondary

NAME (LAST, FIRST, INITIAL)		SOCIAL SECURITY NUMBER	
DATE OF BIRTH/TRUST DATE (MM/DD/YYYY)	RELATIONSHIP	TELEPHONE NUMBER	
MAILING ADDRESS	CITY	STATE	ZIP CODE

Additional Beneficiary or Beneficiaries primary or secondary

NAME (LAST, FIRST, INITIAL)		SOCIAL SECURITY NUMBER	
DATE OF BIRTH/TRUST DATE (MM/DD/YYYY)	RELATIONSHIP	TELEPHONE NUMBER	
MAILING ADDRESS	CITY	STATE	ZIP CODE

Section 6: Option Payee Signature



SIGNATURE OF OPTION PAYEE	SIGNATURE DATE (MM/DD/YYYY)
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