



# Beneficiary Designation Checklist

## Did you recently have a marital status change or acquire a new dependent?

If so, you may need to take action to ensure you have designated the correct beneficiary(ies). Below is a list of County-sponsored plans and programs that require a beneficiary designation, along with a link to where you may obtain a form to change your beneficiary(ies). Please complete any applicable beneficiary designation forms, and submit them to your HR/Benefits Department Representative as soon as possible.

Plan/Program	Who Needs to Designate a Beneficiary	Link
Salary/Wages, Leave and Compensatory Time Banks	All employees	<a href="http://vcportal.ventura.org/CEO/HR/Personnel_Services/docs/VCHRP_Designation_of_Beneficiary_Forms.pdf">http://vcportal.ventura.org/CEO/HR/Personnel_Services/docs/VCHRP_Designation_of_Beneficiary_Forms.pdf</a>
Optional Life Insurance	All employees enrolled in an optional life insurance plan	<a href="http://vcportal.ventura.org/CEO/benefits/docs/Basic&amp;Optional_Life_Beneficiary_Designation_Form.pdf">http://vcportal.ventura.org/CEO/benefits/docs/Basic&amp;Optional_Life_Beneficiary_Designation_Form.pdf</a>
Basic Life Insurance	All Management, CJA AVC, IUOE SEIU, SPOAVC, VCERA, VEA, VCPPOA (Patrol Unit & Probation Unit) employees	<a href="http://vcportal.ventura.org/CEO/benefits/docs/MetLife_Basic&amp;Optional_Life_Beneficiary_Designation_Change_Form.pdf">http://vcportal.ventura.org/CEO/benefits/docs/MetLife_Basic&amp;Optional_Life_Beneficiary_Designation_Change_Form.pdf</a>
Deferred Compensation (401k and 457)	All employees enrolled in a Deferred Compensation plan (401k or 457)	<a href="http://vcportal.ventura.org/CEO/benefits/defer-comp/docs/Online_Beneficiary.pdf">http://vcportal.ventura.org/CEO/benefits/defer-comp/docs/Online_Beneficiary.pdf</a>
Death Benefit – Flexible Benefits Program	All employees enrolled in the Flexible Benefits Program	<a href="http://vcportal.ventura.org/CEO/HR/Personnel_Services/docs/VCHRP_Designation_of_Beneficiary_Forms.pdf">http://vcportal.ventura.org/CEO/HR/Personnel_Services/docs/VCHRP_Designation_of_Beneficiary_Forms.pdf</a>
Wage Supplement Plan AD&D	All employees enrolled in the Wage Supplement Plan	<a href="http://vcportal.ventura.org/CEO/benefits/docs/WSP-Enrollment_Form-Brochure.pdf">http://vcportal.ventura.org/CEO/benefits/docs/WSP-Enrollment_Form-Brochure.pdf</a>
Ventura County Employees' Retirement Association	All employees who currently contribute or have contributed to VCERA	<a href="http://vcportal.ventura.org/VCERA/docs/forms/Beneficiary_Form_0416.pdf">http://vcportal.ventura.org/VCERA/docs/forms/Beneficiary_Form_0416.pdf</a>
Safe Harbor Retirement Plan	All employees who currently contribute or have contributed to Safe Harbor	<a href="http://vcportal.ventura.org/CEO/benefits/safe-harbor/docs/Beneficiary_Designation_Form.pdf">http://vcportal.ventura.org/CEO/benefits/safe-harbor/docs/Beneficiary_Designation_Form.pdf</a>
Accidental Death Benefit per MOA/Management Resolution (a.k.a. Supplemental Life Insurance)	All employees who may fall in one of the following categories: Management in flight, VCPFA in flight, VCDSA in flight, SPOAVC in flight, IUOE in flight; VCDSA Bomb Squad, SWAT, Motorcycle Unit, K-9 Unit, and Narcotics Unit	<a href="http://vcportal.ventura.org/CEO/HR/Personnel_Services/docs/VCHRP_Designation_of_Beneficiary_Forms.pdf">http://vcportal.ventura.org/CEO/HR/Personnel_Services/docs/VCHRP_Designation_of_Beneficiary_Forms.pdf</a>