

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	Designation of Beneficiary(ies) Form
Optional Life Insurance	All employees enrolled in an optional life insurance plan	Beneficiary Designation Form
Basic Life Insurance	All Management, CJA AVC, IUOE SEIU, SPOAVC, VCERA, VEA, VCPPOA (Patrol Unit & Probation Unit) employees	Beneficiary Designation Form
Deferred Compensation (401k , 457 and SRP 457)	All employees enrolled in a Deferred Compensation plan (401k, 457 and SRP 457)	Beneficiary Designation Online - Information
Death Benefit – Flexible Benefits Program	All employees enrolled in the Flexible Benefits Program	Designation of Beneficiary(ies) Form
Wage Supplement Plan AD&D	All employees enrolled in the Wage Supplement Plan	Wage Supplement Plan Enrollment Form
Ventura County Employees' Retirement Association	All employees who currently contribute or have contributed to VCERA	VCERA Beneficiary Designation Form
Safe Harbor Retirement Plan (employees hired on or before April 17, 2021)	All employees who currently contribute or have contributed to Safe Harbor	Safe Harbor Beneficiary Designation Form
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	Designation of Beneficiary(ies) Form