

# ADDITIONAL BENEFICIARY DESIGNATION SHEET

THIS FORM MUST BE ATTACHED TO THE BENEFICIARY DESIGNATION OR ANY APPLICATION/ENROLLMENT FORM TO MAKE THE REQUESTED CHANGE(S)

## 1. CLIENT INFORMATION

Name: \_\_\_\_\_ SSN or Tax ID: \_\_\_\_\_

## 2. ADDITIONAL BENEFICIARY DESIGNATION

### PRIMARY BENEFICIARIES:

Primary beneficiaries receive death benefits upon your death.

Percentage total must equal 100% for all designated primary beneficiaries.

Indicate additional primary beneficiaries below:

1. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____	Relationship: _____	Percent (Whole): _____ %	
2. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____	Relationship: _____	Percent (Whole): _____ %	
3. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____	Relationship: _____	Percent (Whole): _____ %	
4. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____	Relationship: _____	Percent (Whole): _____ %	
5. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____	Relationship: _____	Percent (Whole): _____ %	
6. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____	Relationship: _____	Percent (Whole): _____ %	
7. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____	Relationship: _____	Percent (Whole): _____ %	

### CONTINGENT BENEFICIARIES:

Contingent beneficiaries receive death benefits upon your death if all the primary beneficiaries are deceased or have waived their right to receive the benefits at the time of your death.

Percentage total must equal 100% for all designated contingent beneficiaries.

Indicate additional contingent beneficiaries below:

1. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____	Relationship: _____	Percent (Whole): _____ %	

2. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____		Relationship: _____	Percent (Whole): _____ %
3. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____		Relationship: _____	Percent (Whole): _____ %
4. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____		Relationship: _____	Percent (Whole): _____ %
5. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____		Relationship: _____	Percent (Whole): _____ %
6. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____		Relationship: _____	Percent (Whole): _____ %
7. Name: _____	Phone: (____) _____	DOB or Trust Date: _____	SSN or Tax ID: _____
Address: _____		City: _____	State: _____ Zip: _____
E-mail: _____		Relationship: _____	Percent (Whole): _____ %

### 3. CLIENT APPROVAL

I certify that the information provided above is true and correct. I request the contract/certificate issuer to make the requested change(s).

\_\_\_\_\_  
Client's Signature

\_\_\_\_\_  
Date

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