

**OFFICE & PROFESSIONAL EMPLOYEES INTERNATIONAL UNION,  
LOCAL #11  
HEALTH & WELFARE TRUST**

NEW MEMBER

BENEFICIARY & OR NAME CHANGE

**NAME** \_\_\_\_\_  
Last First Middle

**FORMER NAME** \_\_\_\_\_  
Last First Middle

**ADDRESS** \_\_\_\_\_  
Number Street  
\_\_\_\_\_  
City State Zip

**SOCIAL SECURITY NUMBER** \_\_\_\_\_

**DATE OF BIRTH** \_\_\_\_\_  
Month Day Year

**PRESENT EMPLOYER** \_\_\_\_\_

**EMPLOYMENT DATE** \_\_\_\_\_  
Month Day Year

**BENEFICIARIES** \_\_\_\_\_  
(See reverse side for examples of beneficiary designation)

**DATE OF BIRTH** \_\_\_\_\_  
Month Day Year

**ADDRESS** \_\_\_\_\_

**RELATIONSHIP** \_\_\_\_\_ **SS#** \_\_\_\_\_

**EMPLOYEE SIGNATURE** \_\_\_\_\_

**DATE** \_\_\_\_\_ ***Note: Beneficiary Designation is not valid unless form is signed and dated.***

**Give Full name, address and relationship of your beneficiary. Examples:**

- |           |  |  |
|-----------|--|--|
| <b>A.</b> | One Beneficiary                              | Dorothy Q. Smith, 777 America St., Anytown, USA 77777, Wife (not Mrs. John Smith)                                  |
| <b>B.</b> | Two Beneficiaries                            | Peter Smith, Father, and Anna Smith, Mother, equally, or the survivor  |
| <b>C.</b> | Two Beneficiaries in Unequal Shares          | Peter Smith, Father, three-fourths (3/4), and Anna Smith, Mother, one-fourth (1/4), or the survivor                |
| <b>D.</b> | One Primary and One Contingent Beneficiary   | Dorothy Q. Smith, Wife, if living: otherwise Quincy Smith, Son   |
| <b>E.</b> | One Primary and Two Contingent Beneficiaries | Dorothy Q. Smith, Wife, if living: otherwise Quincy Smith, Son, and Mary Smith, Daughter, equally, or the survivor |
| <b>F.</b> | Trustee                                      | Dorothy Q. Smith, Trustee under trust agreement dated  |
| <b>G.</b> | Insured's Estate                             | My Estate  |

***Do you know that if death occurs and a minor (a person not of legal age) or the insured's estate is the beneficiary, it may be necessary to have a guardian or a legal representative appointed before any death benefit can be paid? This means legal expenses for the beneficiary and delay in the payment of the insurance. Please take this into consideration when naming your beneficiary.***