

Beneficiary Designation



Policy no. _____ Part no. _____ Account no. _____ Certificate no. _____

Group policyholder or participating employer _____

Name of insured _____ Former name _____

If your designation does not fit into one of the sections below please contact your HR representative or our **Customer Service Center** for assistance. For your convenience, a FAQ regarding beneficiary designations is available on our website at www.assurantemployeebenefits.com. Please review and complete the back of this form, as applicable. **Only one section may be completed.**

| | | | | |
|--|--|-----|-----|--------------|
| <input type="checkbox"/> 1. INDIVIDUAL(S) | | | | |
| PRIMARY BENEFICIARY (IES) | All beneficiaries in this section will be considered primary. Proceeds will be paid in equal shares to primary beneficiaries who survive you unless you indicate percentages. Percentages must equal 100%. | | | |
| NAME | PERCENTAGE | DOB | SSN | RELATIONSHIP |
| | | | | |
| | | | | |
| SECONDARY BENEFICIARY (IES) | All beneficiaries in this section will be considered secondary. If no primary beneficiaries survive you, proceeds will be paid to the surviving secondary beneficiaries named in this section. Payment will be paid in equal shares unless you indicate percentages. Percentages must equal 100%. | | | |
| NAME | PERCENTAGE | DOB | SSN | RELATIONSHIP |
| | | | | |
| | | | | |

| | |
|--|---------------------------------|
| <input type="checkbox"/> 2. TRUSTEE UNDER TRUST AGREEMENT | |
| To _____ | NAME OF TRUSTEE |
| of _____ | CITY STATE |
| agreement of _____ | NAME OF SETTLOR, GRANTOR, DONOR |
| dated _____, as amended. | |

| |
|--|
| <input type="checkbox"/> 3. TRUSTEE UNDER WILL |
| To the trustee under my last will and testament, including any codicil thereto |

| |
|--|
| <input type="checkbox"/> 4. ESTATE OF INSURED |
| To the executors or administrators of my estate |

ANY AMOUNT OF INSURANCE PAYABLE AT MY DEATH SHALL BE PAYABLE AS INDICATED ABOVE.

Signature _____ Date _____
Received and recorded by _____ Date _____

Insurance products are underwritten by Union Security Insurance Company (Kansas City, MO) and administered by Sun Life Assurance Company of Canada (Wellesley Hills, MA).

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Reply to: Sun Life Financial
Customer Service Center
300 Southborough Drive, Suite 200 South Portland, ME 04106-6914
T 800.877.2701 F 877.820.5311

General Provisions

- A. Please provide the name, relationship and address of **each** beneficiary named in section 1 on the front of this form.
- B. If there is no beneficiary entitled to payment in accordance with the designation, payment will be made to the spouse of the insured if living; otherwise, in equal shares to the then living children of the insured, if any; or, if none, to the father and mother of the insured, in equal shares or to the survivor of them; or, if none, to the executors or administrators of the insured's estate.
- C. The Company will make payment to the trustee under the insured's last will and testament if it receives at its home office, within one year after the date of the insured's death, evidence satisfactory to it that the trustee is authorized to receive payment under applicable law. If no evidence is received within that period, payment will be made to the executors or administrators of the insured's estate.
- D. Payment to any trustee in accordance with the designation will discharge the Company to the extent of such payment, and the Company will not be responsible for the proper discharge of the trust or any of its terms.
- E. If any Primary or Secondary Beneficiary dies before the insured, then that beneficiary's share will be distributed equally among the other surviving beneficiaries within the same Primary or Secondary designation, unless the insured indicates otherwise in writing.

Name _____

Name _____

Address _____

Address _____

Relationship _____

Relationship _____

Name _____

Name _____

Address _____

Address _____

Relationship _____

Relationship _____

Name _____

Name _____

Address _____

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