

## How to Update Your Retirement Plan Beneficiary(es) on TRI-AD's Website

Your Retirement Plan beneficiary information is stored on TRI-AD's website, and it's your responsibility to keep it current. You can log into the system any time to do update them. Here are the steps to do this:

1. Access your account at [www.tri-ad.com](http://www.tri-ad.com) by pressing the blue Employee Login/Register button on the top right. If you have never accessed the site before, select "Register" and register your account.
2. Select Retirement Plans to access the Retirement Plans dashboard.
3. Now enter your beneficiaries. You may enter primary and secondary beneficiaries, and allocations must add up to 100%.

The screenshot illustrates the process of updating beneficiaries on the TRI-AD website. It is divided into three numbered steps:

- 1. Select the gear:** A green box points to the gear icon in the user profile dropdown menu. The profile shows "Good Afternoon, Sarah Johnson" and "Last Login: August 06, 2019 2:38 PM PST".
- 2. Select "Beneficiaries":** A green box points to the "Beneficiaries" option in the left-hand navigation menu. The menu also includes "Personal Info." and "Logout".
- 3. Enter your beneficiaries:** A green box points to the "Beneficiary Designation 1" form. The form includes a note: "Please note, if you are married and you elect someone other than your spouse as your primary beneficiary you must complete a Beneficiary Designation Form which can be found under Forms & Reports". The form fields include: "Beneficiary type" (set to "Primary"), "Beneficiary percent" (with an asterisk), "Name" (with an asterisk), "Relationship", "Birth date", "Social security number (optional)", "Street address 1", and "Street address 2".

### Important notes:

- **If you are married and are designating someone other than your spouse as your sole primary beneficiary,** you must obtain notarized spousal consent. Please print out the Beneficiary Form under Forms and Reports and complete and return as instructed on the form. *This should be the only circumstance under which you provide a paper form.*
- **If you do not have beneficiaries on file and you pass away,** the Plan document determines the order in which beneficiaries are paid out. If you do not have traceable living relatives, your money would eventually be sent to the state to try to distribute it. **Please provide beneficiaries and keep them up to date!**

### Questions?

Contact TRI-AD at 877-690-4015 (5 AM to 6 PM Pacific time) or email us at [401kmail@tri-ad.com](mailto:401kmail@tri-ad.com).