



Updating Your PERA Beneficiaries PERA DB Plan, PERAPlus Plans, and PERA Life Insurance

Logging into your PERA account information

- Go to the PERA Web site at www.copera.org to log in with your PERA PIN/User ID and password. (If you already have a PERA PIN and it's the first time you are logging in, you will need to log in with your SSN and then create a User ID and password.) If you have forgotten your User ID, click on "Forgot User ID."
- Your account information will appear.

PERA DEFINED BENEFIT PLAN

Review/Change Your PERA Named Beneficiary

- Log in as described above.
- To review your beneficiaries, select "Account Beneficiaries" from the "Inquiry" drop-down menu.
- To change beneficiaries, complete the PERA *Member Information Form* (using one of the methods below).
 - Complete and submit the form online (will require your PERA PIN/User ID and password). Go to the "Online Services" drop-down menu, select "Forms," then "Beneficiary Change," and follow the instructions).
 - Download the "Member Information Form – Defined Benefit Plan" from PERA's Web site and mail the completed form to PERA. To get the form, go to "Forms & Publications" on the home page, then, on the next screen, choose "Member / Retiree Forms & Publications," then choose the "Forms" tab. Look for "Member Information Form – Defined Benefit Plan."
- Your changes will be effective when PERA receives a completed form from you; PERA will mail you a *Change of Beneficiary Confirmation*.

PERAPLUS 401(k)/457/DC PLAN BENEFICIARY

Review/Change Your PERAPlus 401(k)/457/DC Plan Beneficiary

- Log in to your PERA account information as described above.
- To review:
 - Click on 401(k), 457, or DC Plan Account Access on the right side of the screen or under the "Inquiry" menu to go to the 401(k), 457, and DC Plans Web site.
 - Select the plan you want to review (if you have more than one).
 - Select "Personal Information" from the menu at the top and then "Beneficiary Information." Your beneficiary information will appear.
- To change:
 - Choose the "Add/Edit Beneficiary" option on the left side of the screen to add/change your information online.
 - To edit existing beneficiary information online, click the "Change Information" button next to the beneficiary you would like to change.
 - To add a beneficiary online, click the "Add Beneficiary" button then fill out and submit the online form.
 - You may also select the *Beneficiary Designation* form under the "Forms" menu, then print and complete the form and mail it to the address at the top of the form.

- You will receive in the mail a confirmation notice acknowledging your change; your change will be effective when the form is received or when you make the change online.

PERA LIFE INSURANCE BENEFICIARY (plans administered by Unum and by PERA)

Review / Change Your PERA Life Insurance Beneficiary

- Log in to your PERA account information as described above.
- Select “Life Insurance” from the “Inquiry” drop-down menu.
- For plans administered by Unum
 - To review: Click on the link(s) for the policy(ies) to review your beneficiary information.
 - To change: Select “Life Insurance” from the “Inquiry” drop-down menu and click on the “Unum” link under “Policies” and then go to “Manage Beneficiaries.”
 - Call Unum at 1-866-277-1649 to verify beneficiary information if you are in a plan administered by Unum and you do not have Internet/computer access.
- For plans administered by PERA (Anthem Life, New York Life, and Prudential waiver plans)
 - To review: Click on the link(s) for the policy(ies) to review your beneficiary information
 - To change:
 - Print a pdf of the *Life Insurance Beneficiary Change Form* from the PERA Web site at www.copera.org by clicking on the “Forms & Publications” link or call the PERA Customer Service Center at 1-800-759-7372 to request a form be sent to you.
 - Complete the form and send to PERA; your changes will be effective when PERA receives the completed signed form.
 - Call the PERA Customer Service Center at 1-800-759-7372 if you are in a life insurance plan still administered by PERA (Anthem Life, New York Life, and Prudential waiver plans) and you do not have Internet/computer access.