



Duke University Supplemental Term Life Designation Form

Owner Name: \_\_\_\_\_

SSN #: \_\_\_\_\_

Daytime Phone: (\_\_\_\_) \_\_\_\_\_

Certificate #: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Please check if new address

Save time and use our online access to add and/or modify your beneficiary designations by visiting https://personal-plans.com/inquiry.

When appointing the Primary Beneficiary, be sure that the total shares equal 100%. Your Contingent Beneficiary is the person who will receive the death benefit if your primary beneficiary is no longer living. The beneficiary for your dependent(s) coverage is the employee.

All earlier beneficiary designations are hereby revoked, and the following are appointed as beneficiaries under this coverage.

No white outs, write overs, or cross-outs are allowed in this section.

Primary Beneficiary(ies) for Employee Coverage

Table with 6 columns: Primary Beneficiary's Name & Address, Social Security Number, Relationship, Date of Birth, Daytime Phone, Percentage (Must equal 100%).

Contingent Beneficiary(ies) for Employee Coverage

Table with 6 columns: Contingent Beneficiary's Name & Address, Social Security Number, Relationship, Date of Birth, Daytime Phone, Percentage (Must equal 100%).

Community Property State Consent for residents of Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, or Wisconsin. If you are married, live in a community property state and name someone other than your spouse/domestic partner as beneficiary, your spouse/domestic partner will need to sign below to waive his or her rights to any community property interest in the benefit.

As the Insured's spouse, I do hereby consent to the beneficiary designation(s) indicated on this form and waive any rights that I may have to the proceeds of such insurance under applicable community property laws.

Signature of Spouse/Domestic Partner

Date

I stand for the statements and answers given in this request form are true, complete, and correctly recorded to the best of my knowledge and belief. I understand the request for service will not become effective until received at Mercer and approved by the terms of the coverage.

Signature of Owner

Date

(Designations are invalid unless Signature and Date are completed)

## Instructions to the Owner

1. At the top of the form, fill in the information regarding yourself.
2. Next complete the information regarding who will be your primary and contingent beneficiaries. A primary beneficiary will be the person/people that you want to receive the life insurance benefit. The contingent beneficiary or beneficiaries will only receive the life insurance benefit if the primary beneficiary(ies) are no longer living. Indicate the percentage of the benefit amount that the beneficiary will receive. Do not use dollar amounts. Percentages must add up to 100%.
3. If you live in a community property state, are married and naming someone other than your spouse/domestic partner as the primary beneficiary, you will need to have your spouse sign the form to avoid any delays.
4. Sign and date the form.
5. Please send your signed change form to:  
Mercer Voluntary Benefits  
PO Box 9122  
Des Moines, IA 50306-9122

## Frequently Asked Questions

### Should I name a minor child as a beneficiary?

You may name a minor child as a beneficiary, however, please be aware that Lincoln Financial Group cannot make payment of a claim directly to a minor. If a claim is incurred, Lincoln Financial Group would need to make payment to the guardian of the minor's financial estate or pay the funds into a Secureline Minor Account.

### How do I name my Estate as the beneficiary?

You may name your estate as beneficiary. To name your estate as the beneficiary indicate "My Estate" as the beneficiary. If you know who will be the executor or administrator of your estate, you should also include that person's name. For example: My Estate, John Doe Executor.

### How would I name a Charitable Organization as a beneficiary?

A charitable organization that is not your employer may be named as a beneficiary. You will need to indicate the name of the charitable organization, a contact name and phone number for the organization, their tax identification number, and the percentage of the benefit that would be payable to them.

### How do I name a Trust as the beneficiary?

You may designate a trust as a beneficiary. To name a trust as the beneficiary, indicate Trustee (show name and address) under Trust Agreement Dated (show date). If the trust has a tax identification number that will need to be supplied in place of the social security number. For example: Jack Doe Irrevocable Trust, Jill Doe TTEE UTA 1/1/24.

### How do I name a Funeral Home as the beneficiary?

You may designate a funeral home as a beneficiary. You will need to indicate the name of the funeral home, a contact name and phone number, their tax identification number, and the percentage of the benefit that would be payable to them.

Mercer Voluntary Benefits Service  
Program Manager

Lincoln Financial Group  
Program Carrier