

## ILWU-PMA WELFARE PLAN BENEFICIARY DESIGNATION FORM

Registration No. \_\_\_\_\_ Local \_\_\_\_\_ Social Security No. \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Employee or Pensioner Name \_\_\_\_\_  
Last First Middle

**GENERAL INSTRUCTIONS**

1. This form must be completed and signed by the eligible active or retired longshoreman.
2. No Beneficiary Designation Form is effective until it is received by the Trustees.
3. Changes in beneficiary designation may be made at any time by submitting a new Beneficiary Designation Form to the Plan office.
4. The designated beneficiary may be any person or organization **except** any ILWU local, the ILWU International, and Pacific Maritime Association.
5. A longshoreman may designate more than one person or organization as primary beneficiary and specify the percentage of benefits payable to each. Use **Section (i)** to designate a person or organization as primary beneficiary.
6. A longshoreman may designate a Living Trust as primary beneficiary. Before benefits are paid to a Living Trust, certification from the Trustee of the Living Trust will be required that the Living Trust was valid and was not revoked. Use **Section (ii)** to designate a Living Trust as primary beneficiary and provide a copy of the Trust Abstract or signature page as proof of the Trust's validity.
7. A longshoreman may specify a contingency beneficiary to take the place of a primary beneficiary who is deceased or otherwise unqualified to receive the benefit. Use **Section (iii)** to designate a contingency beneficiary if desired.
8. If no valid designation is made, benefits are paid under the laws of the State of California and as provided in the agreement between the Trustees of the Welfare Plan and the Insurance Company.

I hereby designate the following to receive ILWU-PMA Welfare Plan Program I and II life/accidental death benefits that are payable in the event of my death:

**Section (i) - Primary Beneficiary (Person(s) or Organization)**

**Percentage of Benefits  
(total must equal 100%)**

• Name _____ Relationship _____	
Address _____	_____ %
Street _____ City _____ State _____ Zip Code _____	
Social Security No. _____ - _____ - _____ Date of Birth _____	
• Name _____ Relationship _____	
Address _____	_____ %
Street _____ City _____ State _____ Zip Code _____	
Social Security No. _____ - _____ - _____ Date of Birth _____	
• Name _____ Relationship _____	
Address _____	_____ %
Street _____ City _____ State _____ Zip Code _____	
Social Security No. _____ - _____ - _____ Date of Birth _____	
• Name _____ Relationship _____	
Address _____	_____ %
Street _____ City _____ State _____ Zip Code _____	
Social Security No. _____ - _____ - _____ Date of Birth _____	
• Name _____ Relationship _____	
Address _____	_____ %
Street _____ City _____ State _____ Zip Code _____	
Social Security No. _____ - _____ - _____ Date of Birth _____	

(Over)

**Section (ii) - Primary Beneficiary (Living Trust)**

A copy of Trust Abstract or signature page should be attached to this form. Living Trust must be valid and must not have been revoked.

Name of Trust \_\_\_\_\_

Date of Trust \_\_\_\_\_ Trustee \_\_\_\_\_

Address \_\_\_\_\_  
Street City State Zip Code

**Section (iii) - Contingency Beneficiary (optional)**

In the event no primary beneficiary is alive or qualified, benefits will be payable to the contingency beneficiary if named.

				<u>Percentage of benefits</u>
• Name _____	Relationship _____			
Address _____	Street	City	State Zip Code	_____ %
Social Security No. _____ - _____ - _____	Date of Birth _____			
• Name _____	Relationship _____			
Address _____	Street	City	State Zip Code	_____ %
Social Security No. _____ - _____ - _____	Date of Birth _____			
• Name _____	Relationship _____			
Address _____	Street	City	State Zip Code	_____ %
Social Security No. _____ - _____ - _____	Date of Birth _____			
				<b>Section (iii) total must equal 100%</b>

Signature of Longshoreman \_\_\_\_\_ Reg.No. \_\_\_\_\_

Date \_\_\_\_\_

( ) \_\_\_\_\_  
Telephone

Mail completed, signed form to: ILWU-PMA Benefit Plans  
1188 Franklin Street, Suite 101  
San Francisco, CA 94109