How a Participant Makes Changes to Their Beneficiary Information

A Participant can make changes to their beneficiary information and/or allocations at any time, by following these steps:

- Log in to your Participant account
- Click on the Gear icon the upper right and select "**Beneficiaries**"
- If you are adding a new beneficiary, click the "**ADD**" button on the bottom left
- Enter in all of the required information (including the desired allocation percentage for the beneficiary) and select the beneficiary type (either primary or contingent)
- Click "**SAVE**"
- Repeat for each Primary Beneficiary as well as for each Contingent Beneficiary
  - Please note: the allocation percentages for both the primary and contingent beneficiary(ies) must sum to 100%
- To change information on existing beneficiaries, enter/change any information for the beneficiary and click on "**SAVE**" to save your changes.
  - Please note: the allocation percentages for both the primary and contingent beneficiary(ies) must sum to 100%
- When you make online changes to your existing beneficiary information, you should also **complete a Beneficiary Designation/Change Form and submit a signed copy to your Human Resources representative**
  - In the event of your death, a distribution will be made on your behalf according to the most recent signed Beneficiary Designation/Change Form on file with the Plan Sponsor (i.e. your employer). This form can be found online via the "**Forms & Reports**" tab (select "Forms & Docs").

Please Note: Participants should also complete a Beneficiary Designation/Change Form **and submit a signed copy to your Human Resources representative.**

If you have any additional questions, please contact Newport Group Client Services at 1-888-886-8256 or clientservices@newportgroup.com