

Retirement plan information — Managing your beneficiary(ies)

SELECTING A BENEFICIARY IS AN IMPORTANT PART OF YOUR OVERALL FINANCIAL WELLNESS. It ensures that the assets from your retirement savings account are distributed to the person, people, or entities you want it to go to upon your death. It's equally important to keep your beneficiary information up to date, especially after major life event changes, such as marriage, divorce, death, the birth or adoption of a child, etc.



Manage your beneficiary information in a few easy steps once you have signed into your ADP Mobile App or your online retirement account at My.ADP.com.

Manage Your Account

- Manage your beneficiaries** >
Designate who will inherit your benefits.
- Learn more about your plan** >
Review plan highlights and features.
- Discover more account options** >
Complete transactions, view history, and more.

Step 1

Go to **Retirement > Manage Your Account > Manage My Beneficiaries.**

IMPORTANT NOTE: Additional security measures are in place for this transaction. You will be required to enter a security code before you can manage beneficiary information.

Step 2

You will need to select your current marital status and attest to your selection to proceed.

If you are married and elect a non-spousal beneficiary, you will be prompted to complete and return a hard copy version of the Beneficiary Designation Form (requiring spousal consent).

Designate Your Beneficiaries ✕

Choose from the following options based on your current marital status.

I'm single.

I'm married and want to designate my spouse as my sole primary beneficiary.

I'm married, but my spouse will not be the sole primary beneficiary.
This less common occurrence can't be completed online because it requires you and your spouse to complete and submit a signed notarized Beneficiary Designation Form to your employer. You'll be able to download the form and learn about the process in the next step.

I attest that the information above reflects my current marital status.

Cancel Continue

Step 3

Review the beneficiary information. You can make updates as necessary, such as add a new beneficiary or deleting an existing one.

← Back **Manage Your Beneficiaries**

Designating as: **Single** ↔ Change

Total allocations for your primary and, if designated, secondary beneficiaries must equal 100%.

Beneficiary	Allocation % Primary	Allocation % Secondary
My Person	100%	0%
Other	0%	0%
Total allocation:		100% 0%

↕ Add beneficiaries

Things to keep in mind as you manage your beneficiaries.

- You must designate a primary beneficiary.
- It's best practice to designate secondary beneficiaries as well.
- If your marital status changes, come back and review your designations.

Save Cancel

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