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.

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.

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.

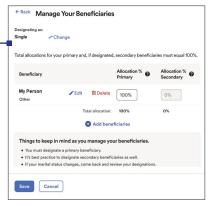
If you are married and elect a non-spousal beneficiary, you will be prompted to complete and return a hard copy version of the Beneficiary Designation Form (requiring spousal consent).

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 3

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



ADP, Inc. owns and operates the ADP participant websites and the ADP Mobile Solutions App. ADP, Inc. is a retirement plan record keeper and is not associated with your employer. By delivering this material, ADP, Inc. its affiliates and their employees ("ADP") are merely providing a service to clients of ADP Retirement Services and are not making any representations about or promoting the services of any third party, nor making any representations about or assuming any responsibility for the accuracy and/or content of these materials, except to the extent such materials specifically address or mention ADP and/or its services.

ADP RETIREMENT SERVICES 71 Hanover Road, Florham Park, NJ 07932

ADP, the ADP logo and Always Designing for People are trademarks of ADP, Inc. All other trademarks and service marks are the property of their respective owners. 99-4052-P-03-0424 M-499157-2024-02-13 Printed in USA © 2024 ADP, Inc. All Rights Reserved.

