

How to Elect a Beneficiary for your Workplace Retirement Savings Plan



1. Log into NetBenefits® at www.401k.com.
2. In the top right-hand corner, select *Profile & Settings*
3. Select the *Beneficiaries* tile
4. Follow the 3 steps on the *Manage beneficiaries* page:
 - ❖ *Get Started*- confirm marital status
 - ❖ *Add beneficiaries*- Person, Estate, or Trust
 - ❖ *Assign beneficiaries*- you may set primary and contingent beneficiaries, then elect percentages.
5. You may also complete these steps by simply scanning the QR code on your mobile device.

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Log in

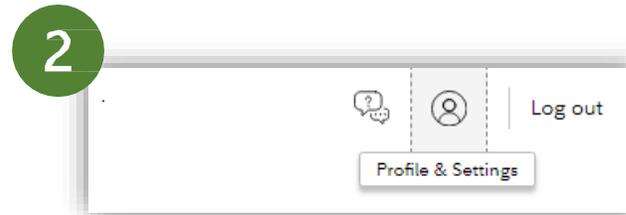
Username

Password

Remember my username

Log in

[Forgot username or password?](#)



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Manage beneficiaries

Setting beneficiaries makes sure your benefits get to the right people, estates, trusts, or organizations when the time comes. We'll help make sure all your information is in order.

1 We'll display or prefill details about you and people we have on record for you, though you can update these at any time. Using this site means you agree we can display or prefill these details.

Get started

We'll ask a few questions to get you on the right path.

[Review](#)

Add beneficiaries

Check who you have on record, update details, or add brand new people to ready them as beneficiaries.

Start

Assign beneficiaries

You'll set primary and then contingent beneficiaries.

Progress: Add beneficiaries (active) | Set addresses | Review and submit

Add beneficiaries

Consider who you'd want as your primary beneficiaries and potential contingent beneficiaries (this is optional). If your primary beneficiaries aren't alive when you pass away, then the contingent beneficiary inherits your assets instead. Make sure all your beneficiaries are listed here before you continue.

Person

These are loved ones and other people you want to leave money to.

Add

Estate

These handle debts and assets and can tie to wills and executors.

Add

Trust

These give control of property and assets to people or institutions.

Add

