

# Update Beneficiaries

## Overview

Update Beneficiaries allows you to update beneficiaries for your Life Insurance and AD&PL plans.

**Who Does This:** Employee

## Things to Know:

- You can change your beneficiaries at any time.



**Benefits**

### Step 1

Choose the Benefits worklet.

## Change

Benefits

Beneficiaries

Dependents

### Step 2

Under Change, choose **Benefits**.

Benefit Event Type

\* Beneficiary Change

3

Benefit Event Date

\* MM / DD / YYYY



4

Submit

5

Save for Later

Cancel

### Step 3

Select **Beneficiary Change** from the list of Benefit Event Types.


### Step 4

Use the calendar icon  to select today's date as the Benefits Event Date.

### Step 5

Select **Submit**.

Up Next



Change Benefit Elections

Open

**Step 6**  
Select **Open**.

Health Information

1 item

Have you used tobacco in any form in the past 12 months? **7**

Yes

No

Continue Save for Later Cancel

**Step 7**  
Select **Yes or No** related to your tobacco use.

**Step 8**  
Select **Continue**.

Beneficiary Designations 2 items

Benefit Plan	Requires Beneficiary
USA - Basic Life - Aetna (Employee)	<input type="checkbox"/> <b>+</b>

**Step 9**  
Select the **plus** icon **+** to add a beneficiary to the plan.

Note: You may select the plus icon **+** multiple times to add multiple beneficiaries.

\*Beneficiary

**☰**

**Step 10**  
Use the list icon **☰** and select your beneficiary.

Beneficiary Persons >





Trusts **or** >

Create >

**Step 11**  
Select your beneficiary from the **Beneficiary Persons** list.

If you are able to select from the Beneficiary Persons list, select and then skip to **Step 20**.

If you do **NOT** have a beneficiary established Select **Create** and proceed to **Step 12**.

<p>← Create</p> <p><b>Add Beneficiary</b></p> <p>Add Beneficiary Using Existing Contact</p> <p>Add Trust</p>	<p><b>Step 12</b> Select <b>Add Beneficiary</b>.</p>
<p>Enter your beneficiary information.</p> <p>Relationship * <input type="text" value=""/> 13</p> <p>Use as Beneficiary <input checked="" type="checkbox"/></p> <p>Date of Birth <input type="text" value="MM / DD / YYYY"/> 14</p> <p>Age (empty)</p> <p>Gender <input type="text" value="select one"/> 15</p>	<p><b>Step 13</b> Use the list icon  to select your relationship to your beneficiary.</p> <p><b>Step 14</b> Enter your beneficiary's date of birth.</p> <p><b>Step 15</b> Select your beneficiary's gender.</p>
<p>Legal Name    Contact Information    National IDs</p> <p>Country * <input type="text" value="X United States of America"/> </p> <p>Prefix <input type="text" value=""/> </p> <p>First Name * <input type="text" value=""/></p> <p>Middle Name <input type="text" value=""/></p> <p>Last Name * <input type="text" value=""/></p> <p>Suffix <input type="text" value=""/> </p>	<p><b>Step 16</b> Enter his/her Legal Name.</p>
<p>Legal Name    <b>Contact Information</b>    National IDs</p> <p>17</p> <p>Phone</p> <p><input type="button" value="Add"/></p> <p>Address</p> <p><input type="button" value="Add"/> 18</p>	<p><b>Step 17</b> Select <b>Contact Information</b>.</p> <p><b>Step 18</b> Under Address, select <b>Add</b>.</p>

## Address

Use Existing Address

Country \*

Address Line 1 \*

Address Line 2

City \*

State \*

Postal Code \*

County

## Usage

Type \*

OK

### Step 19

Enter his/her Address information

Select **OK**.

Primary Percentage

Contingent Percentage

Continue

### Step 20

For each beneficiary, enter a Primary Percentage or a Contingent Percentage.

Note: The sum of all Primary Percentages on a benefit plan must equal 100%. If you choose to add contingent beneficiaries, the sum of the Contingent Percentages must equal 100%.

Select **Continue**.

## Electronic Signature

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### LEGAL NOTICE: Please Read

Your Name and Password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted.

When you check the "I AGREE" checkbox, you are certifying that:

1. You understand that your benefit elections are legal and binding transactions.
2. You understand that all benefits are contingent upon your enrollment and acceptance by Human Resources and by your insurance carriers or benefit providers.
3. You authorize CoorsTek to establish the benefits you select and to deduct from your pay any pre-tax amounts that are necessary to pay for your benefit elections or any subsequent enrollments or change in benefits. If you do not work enough hours to cover your premium payments each payroll, you agree to write a personal check for the balance owed and submit it to Human Resources within five days. Otherwise, you acknowledge your insurance coverage may be terminated for late payment.

I Agree  22

Submit

23 Save for Later

### Step 21

Review the Legal Notice.

### Step 22

Agree to the Electronic Signature by clicking in the box next to "I Agree".

### Step 23

Select **Submit**.

## FAQ's

**How can I edit or delete my beneficiaries information?** If you need to change information (such as relationship or contact information) regarding your beneficiaries, select the Benefit worklet, then under Change, choose Beneficiaries.

**How do I add a beneficiary to my 401k plan?** Please visit [www.401k.com](http://www.401k.com)

**How do I add a beneficiary to my Discovery Benefits Health Savings Account?** Please visit [www.discoverybenefits.com](http://www.discoverybenefits.com) and select "profile"

**Can I have more than one beneficiary for a plan?** Yes, after you add a beneficiary select the + icon again and add another. Remember that the total primary percentage by plan cannot be more than 100% and the contingency percentage must also equal 100%.

**Can I have different beneficiaries for different plans?** Yes, on Step 6 above, you can select or create different beneficiaries for each plan listed.

**What is the difference between a primary beneficiary and a contingent beneficiary?** Your primary beneficiary is first in line to receive the named benefits. Contingent beneficiaries will only receive benefits if the primary beneficiary has died.