



**CHRISTIAN  
BROTHERS  
SERVICES**

**Employee Benefit Trust**  
1205 Windham Parkway  
Romeoville, IL 60446  
800.807.9460 / 630.378.3005 fax

**PLEASE NOTE: DO NOT USE THIS FORM TO CHANGE THE BENEFICIARY DESIGNATION.**

**Life Insurance and Long-Term Disability Form for  
Christian Brothers Employee Benefit Trust**

**Please print or type.**

Location Name:				Location#:	
Employee's Name:					
<b>Employee's Home Address</b>		Street:			
City:		State:		Zip Code:	
Employee's Soc. Sec. #:			Date of Birth:		
First Active Day of Work:		<b>Enrollment Use Only</b>	Effective Date of Coverage:		
<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced			
Annual Salary:		Occupation:			

**Primary Beneficiary Designation**

(If additional Beneficiaries, please attach additional page)

Full Name (Last, First, MI)	Relationship	Date of Birth	Share %

In the event said primary beneficiary(ies) predecease(s) the insured, I designate as contingent beneficiary(ies)

**Contingent Beneficiary Designation**

(If additional Beneficiaries, please attach additional page)

Full Name (Last, First, MI)	Relationship	Date of Birth	Share %

**Payment will be made in equal share or all to the survivor unless otherwise indicated.**

**If no beneficiary or contingent beneficiary designated shall be living following the insured's death, the amount payable by reason of the insured's death shall be payable as provided in the Group Policy.**

Signature of Employee:		Date:	
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Popular Beneficiary Designations

Be sure to use given names such as “Mary M. Doe”, not Mrs. John Doe”. The following sample designations may be helpful to you.

<u>Type of Beneficiary</u>	<u>Standard Wording</u>
1. insured’s estate	my estate
2. one beneficiary	Anna L. Doe wife
3. two beneficiaries	John A. Doe, father, and Mary I. Doe, mother, equally or to the survivor
4. three or more beneficiaries	John A. Doe, father, and Mary I. Doe, mother, and Henry J. Doe, son, equally or to the survivor(s)
5. one beneficiary and one contingent beneficiary	Anna L. Doe, wife, if living; otherwise, Henry J. Doe, son
6. one beneficiary and two or more contingent beneficiaries	Anna L. Doe, wife, if living, otherwise Henry J. Doe, son, Alice G. Doe, daughter, equally or to the survivor
7. one beneficiary and three or more contingent beneficiaries	Anna L. Doe, wife, if living, otherwise Henry J. Doe, Alice G. Doe and Charles B. Doe, children, equally or to the survivor(s)
8. two beneficiaries and one contingent beneficiary	John A Doe, father, and Mary I. Doe, mother, equally or to the survivor; otherwise, Anna L. Doe, wife
9. two beneficiaries in unequal portions	three-quarters of the proceeds to John A. Doe, father, if living, and one-quarter to Anna L. Doe, mother, if living, the share of a deceased beneficiary to be paid to the survivor, if any
10. trust with individual trustees	Richard Doe and John Smith, trustees, or a successor in trust under (trust name) established (date of trust agreement)
11. present or living trust	ABC Bank and Trust Company, Des Moines, Iowa, trustee or successor in trust under (trust name) established (date of trust agreement), provided however that the company has received within 180 days of the death of the insured, evidence satisfactory to the existence of such trust; otherwise to the estate of the insured.
12. testamentary trust	Trustee of the Mary L. Doe trust or successor in trust established by the last will and testament of the insured dated.....
13. minor beneficiaries	When either the primary or contingent beneficiary designation includes one or more minor children, you need to complete an additional form, beneficiary designation with UTMA custodian. Please contact CBEBS for this form.