

## Beneficiary Designation Quick Guide

## ADD A NEW BENEFICIARY

- ✓ Log on to www.mybentek.com/<clientsite>
- ✓ Click "+ Person" or "+ Trust".
- Enter the beneficiary information (asterisk denotes required information).
- Adding a minor? Toggle the "Is this beneficiary a Minor" button and enter guardian information.
- ✓ Click "Save new beneficiary"



| MY BENEFICIARIES                            |                                          |            |         |             |
|---------------------------------------------|------------------------------------------|------------|---------|-------------|
| - Basic Life: \$20,000                      |                                          |            | ⊕ Pers  | ion ⊕Trust  |
| Name                                        | Group                                    | Percentage | Group   | Percentage  |
| Kelly Smith   Sister                        | Primary                                  | ~ 100      | Primary | 100%        |
| > Tom Smith   Brother                       | -Select One-                             |            |         |             |
|                                             | Primary                                  |            | 5       |             |
| <ul> <li>Supp EE Life: \$100,000</li> </ul> | Contingent Group 1<br>Contingent Group 2 |            | Pers    | ion 💮 Trust |
| Name                                        | No Designation                           | Percentage | Group   | Percentage  |
| Kelly Smith   Sister                        | Primary                                  | ~ 100      | Primary | 100%        |
| > Tom Smith   Brother                       | No Designation                           | *          |         |             |

Click here to edit beneficiary.

## **DESIGNATE YOUR BENEFICIARY**

- Select primary or a contingent group for each beneficiary.
- Select the benefit percentage each beneficiary should receive. Percentage amounts must be whole numbers and equal 100% for each group.
- Click "I Agree" under the beneficiary acknowledgment and "Submit Session".
- $\checkmark$  Click the adobe icon to generate your beneficiary designation Form.

## **OTHER QUICK TIPS**

- ✓ To edit a current beneficiary, click the arrow next to their name.
- ✓ To completely remove a beneficiary, click the arrow next to the beneficiary name and click "remove This Beneficiary From All Plans".