

Benefits Beneficiary Guide



Benefit Plan	Beneficiary Instructions	Contact
Savings Plan Deferred Compensation Programs	<p>Log in to HR Express. Select the “Retirement, Savings and Stock” tile. Under Express Help, choose “Get seamless access to your savings plan account.” In your Vanguard account, mouse over the My Profile tab and select “Beneficiaries.” Select “Edit” and complete the required fields. Designate primary <u>and</u> contingent beneficiaries as appropriate. Select “Submit.”</p> <p><i>*Individual (non-employer sponsored) accounts require you to now select “Log in” from the pop-up window and select “Employer Plans” before advancing.</i></p>	Vanguard 800-523-1188
Health Savings Account (HSA)	<p>Log in to HR Express. Select the “Health Benefits” tile. Click on the Bank of America link for seamless account access. Select “Profile.” Click “Add Beneficiary.” Check the “Add New Beneficiary” box. Fill out the appropriate information. Designate primary <u>and</u> contingent beneficiaries as appropriate. Select “Submit.”</p>	Bank of America 800-619-4663
Basic Life Insurance Supplemental Life Insurance Accidental Death & Dismemberment (AD&D) Occupational Accidental Death (OAD) Retirement Plan Key Employee Supplemental Retirement Plan	<p>Log in to HR Express. Select the “Health Benefits” tile. Select the “Your Benefits Resources (YBR)” link. Now in YBR, select “Your Profile” from the drop down menu at the top, right hand corner of the page. Select “Beneficiaries.” Depending on your benefit selection, you will see one to six benefit tabs. Beginning with the first tab, select “Add Beneficiary.” Follow the steps as prompted.</p>	Benefits Center 800-622-5501
Dependent Life Insurance	<p>As the employee, <u>you are the designated beneficiary</u> of your dependent life insurance. You <u>cannot</u> name someone else as the beneficiary, and you <u>cannot</u> name a contingent beneficiary.</p> <p><i>For more information, refer to the Employee Benefits Handbook.</i></p>	Benefits Center 800-622-5501
Restricted Stock Units (RSU)	<p>Per the applicable Terms and Conditions, RSUs <u>cannot</u> be assigned to a beneficiary, except by (i) will, or (ii) the laws of descent and distribution.</p>	Bank of America Merrill Lynch 877-785-7526

Note: Be prepared with your beneficiary’s date of birth, Social Security Number, address and phone number. For certain plans, if you designate as your primary beneficiary someone who is not your spouse, you may be required to complete and submit an additional form or obtain your spouse’s notarized consent.