



## Beneficiary/Survivor Checklist

All required documents must be submitted prior to disbursement of any funds. Each applicant is responsible for ensuring the necessary paperwork is submitted to LSERS.

**Beneficiary(s) Documents:** *A beneficiary is a person(s), designated by a retiree, to receive a benefit from their retirement account upon their death.*

The following are required for all beneficiaries:

- Copy of member's death certificate
- Copy of beneficiary(s) social security card(s)

Active member refunds, Option 1 beneficiaries or beneficiaries of return-to-work retirees:

- [Form 7](#) "Application for Refund of Member Contributions" (spouse) or [Form 7D](#) "Application for Refund of Contributions to Beneficiary" (non-spousal)

Option 2, 2A, 3, 3A, 4 or 4A beneficiary should submit:

- [Form 8](#) "Authorization for Direct Deposit"
- [Form W4P](#) "Withholding Certificate for Pension or Annuity Payments"

DROP/IBRP beneficiaries should submit:

- [Form 11D](#) "DROP or IBRP Account Withdrawal Selection"

**Survivor(s) Documents:** *A survivor is a person(s), designated by an actively contributing member (non-retired), to receive a monthly benefit in the event of their death.*

The following are required for all survivors:

- [Form 13](#) "Application for Survivor Benefit"
- Copy of member's death certificate
- Copy of survivor(s) social security card(s)
- Copy of survivor(s) birth certificate(s)
- [Form 8](#) "Authorization for Direct Deposit"
- [Form W4P](#) "Withholding Certificate for Pension or Annuity Payments"

For surviving spouse:

- Copy of marriage license

For surviving eligible child(ren):

- [Form 13B](#) "Student Certification"
- [Form 12C](#) "Physician Report of Disability" (only if child is certified as having a permanent disability)
- Tutorship papers (if someone other than a parent has guardianship)