



## Beneficiary/Survivor Checklist

When a member of LSERS dies, a monthly benefit, any remaining contributions balance, and/or DROP/IBRP account balance may be payable, depending on the account status at member's death.

### Retirement Beneficiary Monthly Benefit

Members retired with one option of 2-4A, who have named a beneficiary to receive a monthly benefit upon their death:

- [Form 8](#) – Authorization for Direct Deposit
- [Form W4P](#) – Withholding Certificate for Pension or Annuity Payments
- Copy of member's death certificate
- Copy of beneficiary's Social Security card

### Survivor Benefit

Members who have not retired but have a spouse and/or children eligible for monthly benefits upon their death:

- [Form 13](#) – Application for Survivor Benefit
- [Form 8](#) – Authorization for Direct Deposit
- [Form W4P](#) – Withholding Certificate for Pension or Annuity Payments
- [Form 13B](#) – Student Certification for all surviving children between ages 18 – 23
- [Form 12C](#) – Physician Report of Disability for all surviving children who have been certified as having a permanent mental or physical disability
- Copy of member's death certificate
- Copy of marriage license for a surviving spouse
- Copy of survivor(s) birth certificate(s)
- Copy of survivor(s) Social Security card(s)

### Balance of Member Contributions

Members, regardless of retirement status, who have named beneficiary(s) to receive their remaining contributions balance upon their death:

- Copy of member's death certificate
- Copy of beneficiary(s) Social Security card(s)
- [Form 7D](#) – Application for Refund of Contributions to Beneficiary

### Balance of DROP/IBRP Account for members eligible to retire before 1/1/2004\*

Members named beneficiary(s) to receive their remaining DROP/IBRP account balance upon their death:

- Copy of member's death certificate
- Copy of beneficiary(s) Social Security card(s)
- Form 11D – DROP or IBRP Account Withdrawal Selection (call 1.800.256.3718 for a copy)

\*If the deceased member was eligible to retire on or after 1/1/2004 and entered DROP, contact Empower Retirement at 1.800.701.8255 or [www.louisianadcp.com](http://www.louisianadcp.com).