



**PRE-SELECTION BEFORE SERVICE RETIREMENT**  
**MAXIMUM SURVIVORSHIP OPTION (OPTION 2)**

- STEP 1** – Select the appropriate group classification in Section I.  
**STEP 2** – Nominate one or more beneficiary(ies) in Section II. Multiple beneficiaries are limited to a spouse and/or children. An estate or trust cannot be named as a beneficiary for Pre-selection. For this election to take effect, the nominated beneficiary (ies) must be the same as the beneficiary(ies) listed on the *Designation of Death Beneficiary(ies) (Pre-Retirement) (D-NHRS-2)* form.  
**STEP 3** – If the member is married, the spouse’s signature is required in Section III, acknowledged in the presence of a Notary Public or Justice of the Peace.  
**STEP 4** – Section IV must include the member’s signature, acknowledged in the presence of a Notary Public or Justice of the Peace. A copy of the member’s birth certificate and the beneficiary(ies) birth certificate(s) must be submitted with this form. Members should retain a copy of this form for their records.

(See reverse side for more information before completing this form.)

<b>SECTION I – GROUP CLASSIFICATION</b> <i>(Check only one box.)</i>		
Member’s Group Classification		
<input type="checkbox"/> <b>Group I</b> (Employee and Teacher)	<input type="checkbox"/> <b>Group II</b> (Police and Fire)	<input type="checkbox"/> <b>Split</b> (Creditable service in both Group I and Group II)

<b>SECTION II – DESIGNATION OF BENEFICIARY(IES)</b>					
I designate the following person(s) to receive Survivorship Option 2 upon my death before retirement.					
To designate additional beneficiaries, <b>initial here</b> _____ and attach signed supplemental information to this form.					
The sum of the distribution percentages must equal 100%.					
Beneficiary’s Name	Distribution Percentage	Beneficiary’s Address	Beneficiary’s Last 4 of SS#	Beneficiary’s Date of Birth	Relationship to Member
1.	%				
2.	%				
3.	%				
4.	%				

<b>SECTION III – SPOUSAL ACKNOWLEDGMENT</b> <i>(Skip to Section IV if you are not married)</i>			
I have read both sides of this form and understand the death benefit option and designated beneficiary that my spouse is selecting pursuant to this form.			
Name of Member’s Spouse: _____		Signature of Member’s Spouse: _____	
Date: ____/____/____ <small>Month Day Year</small>			
State of _____		County of _____	
The foregoing instrument was acknowledged before me this _____ by _____			
_____		_____	
<small>Signature of Person Taking Acknowledgment</small>		<small>Title (Notary Public or Justice of the Peace)</small>	
		<small>Expiration Date</small>	
		<small>Affix Seal</small>	

<b>SECTION IV – MEMBER’S SIGNATURE AND ACKNOWLEDGMENT</b>			
I elect Survivorship Option 2, pursuant to RSA 100-A:13. I understand that payments will not be made under this Pre-selection unless I die after attaining eligibility to receive a monthly retirement allowance, but before filing a retirement application. I understand that this Pre-selection expires once the retirement application is received, and that a retirement application must be filed with NHRS in order for me to receive a pension and to designate the post-retirement beneficiary(ies). I understand that this election is not valid unless the beneficiary(ies) in Section II is the same as the beneficiary(ies) on the form entitled <i>Designation of Death Beneficiary(ies) (Pre-Retirement) (D-NHRS-2)</i> . I have read and understand the information on both sides of this form.			
Member’s Name (Please Print): _____		Member’s Signature: _____	
Date: ____/____/____ Member’s Marital Status: _____			
<small>Month Day Year</small>			
State of _____		County of _____	
The foregoing instrument was acknowledged before me this _____ by _____			
_____		_____	
<small>Signature of Person Taking Acknowledgment</small>		<small>Title (Notary Public or Justice of the Peace)</small>	
		<small>Expiration Date</small>	
		<small>Affix Seal</small>	

The New Hampshire Retirement System (NHRS) is governed by New Hampshire RSA 100-A, rules, regulations, and Federal laws including the Internal Revenue Code. NHRS also implements policies adopted by the Board of Trustees. These laws, rules, regulations, and policies are subject to change. Even though the goal of NHRS is to provide information that is current, correct, and complete, NHRS does not make any representation or warranty as to the current applicability, accuracy, or completeness of any information provided. The information herein is intended to provide general information only, and should not be construed as a legal opinion or as legal advice. Members are encouraged to address specific questions regarding NHRS with an NHRS representative. In the event of any conflict between the information herein and the laws, rules, and regulations which govern NHRS, the laws, rules, and regulations shall prevail.

## **PRE-SELECTION BEFORE SERVICE RETIREMENT** **MAXIMUM SURVIVORSHIP OPTION (OPTION 2)**

### **A. WHY FILE THIS FORM?**

The advantage of filing a Pre-selection form is that if a member who is eligible to receive a monthly pension benefit dies after filing this form but before filing a retirement application, and if the beneficiary(ies) named on the Pre-selection form is the same primary beneficiary(ies) as named on the *Designation of Death Beneficiary(ies) (Pre-Retirement) (D-NHRS-2)* form, then the member's beneficiary(ies) may choose whichever is more advantageous to the beneficiary(ies): *either* a lifetime pension with a 100% Survivorship Option (Option 2), *or* the lump sum payment under the Ordinary or Accidental Death Benefit (whichever applies) under RSA 100-A:8 and RSA 100-A:9, plus a refund of the member's accumulated contributions. If multiple beneficiaries are named, the choice of a lifetime pension or the lump sum benefit must be agreed to as a group.

### **B. ELIGIBILITY**

- Members who are in active service in an NHRS-covered position who have not filed an application for retirement. Note: Although all active members may file a pre-selection form at any point in their career, pre-selection does not apply if the member dies in service prior to attaining eligibility for a monthly pension benefit.
- Members who are not in active service who are eligible for a service retirement under RSA 100-A:5, I(a), RSA 100-A:5, II(a) or RSA 100-A:19-b but have not filed an application for retirement.

### **C. CHANGES**

- A member may change his or her pre-selection at any time. The nominated beneficiary(ies) must be the same as the beneficiary(ies) listed on the *Designation of Death Beneficiary(ies) (Pre-Retirement) (D-NHRS-2)* form.
- NHRS encourages members to review their pre-selection in the event of a change in circumstances such as a divorce or death of the named beneficiary.

### **D. MAXIMUM BENEFIT LIMITATIONS**

Any pension payable to the member or beneficiary(ies) is subject to the limitations set forth in RSA 100-A:13-b and Sections 415 and 401(a)(9) of the Internal Revenue Code of 1986 (the "Code"), as amended, and related Treasury regulations. The beneficiary(ies) cannot receive a pension of more than 100% of the member's reduced retirement pension. The Code may limit the pension payable to the non-spouse beneficiary(ies) who is more than ten years younger than the member. The exact percentage varies according to the age of the member and the age(s) of the beneficiary(ies).