SAVING : INVESTING : PLANNING

How do I update my beneficiary information?

Designate beneficiaries for your retirement accounts

Oregon Episcopal School

Updating your beneficiaries online is easy. Here's how:

Get started	• Log in to your account on **VALIC.com/[customsite]** • On the next screen, click the dropdown menu next to your name at the top of the page • Click **"Change Beneficiaries"** This page provides access to add, update or delete beneficiaries as well as a link to designate beneficiary percentages
Create a new beneficiary	• Click **"Add a beneficiary"** • Enter the new beneficiary's details • Click the **"Save"** button Note: Fields with a red asterisk are required
Edit a beneficiary	• Click the plus sign by the beneficiary's name • Edit desired fields on the record • Click the **"Save"** button
Delete a beneficiary	• While editing the record, click the **"Delete"** button Note: Only unassigned beneficiaries can be deleted

Set or manage beneficiaries	• Click the **"Beneficiary Designations"** button at the bottom of the screen
	• Scroll down until the buttons **"Manage Your Beneficiary"** and **"Change Beneficiary Designation"** appear
	• To edit a designation, click **"Change Beneficiary Designation"**
	  ■ To modify, click **"Update"**
	  ■ Change the benefit percentage and/or the **"Primary or Contingent"** type
	  ■ You can also choose to click **"Remove"**
	  ■ Before removing, you must first delete the percentage
	• To add a beneficiary, click **"Add Beneficiary Designation"**
	  – Select the desired person/entity from the dropdown on the left
	• Set **"Primary or Contingent"** and enter a percentage
	  – Click the **"Add"** button

How do I update my beneficiary information?

Review your beneficiary designations	• From any page ... — Click **"Your Name"** in the upper right corner of the page — Click **"Change Beneficiaries"** — Click the **"Beneficiary Designation"** button

Will VALIC send a confirmation of the updated beneficiary designation to me?

Yes, VALIC will send a confirmation email by way of Personal***Deliver-e***® whenever you update a beneficiary designation. In addition, VALIC will mail a confirmation letter to your address of record. Beneficiary updates will also appear on your next quarterly statement.

Your Future is Calling. Meet It with Confidence.

CLICK VALIC.com **CALL** 1-800-426-3753 **VISIT** your financial advisor

[FA Name - FINRA Registered Office Phone, FINRA Registered Office Address]

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