How To: Updating Beneficiary Information

Support Team 2 years ago

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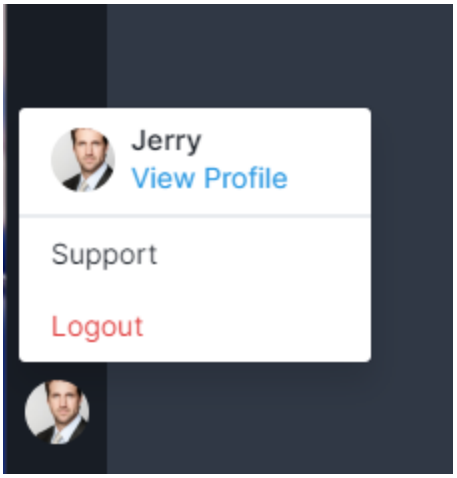
Naming beneficiaries and keeping their information up-to-date makes it easier to pay out benefits at the time of claim. This is particularly important for benefits that pay out at the time of death.

If you need to add or edit your beneficiaries, you may do so at the end of your benefit enrollment. If you are not making benefit changes, this information can also be edited directly in your profile.

Note: Flock does not support naming beneficiaries by benefit type. Any beneficiaries added will be applied to all of the applicable, enrolled benefits.

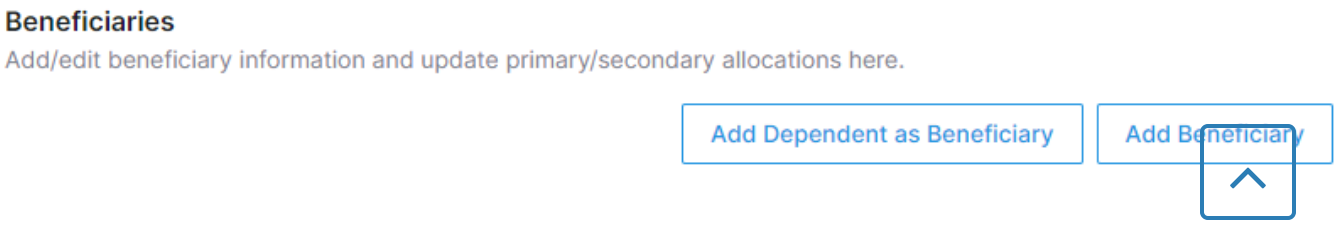
To edit your beneficiary information within your profile:

1. Click on your profile icon on the bottom left of the page. Then, click **View Profile.**

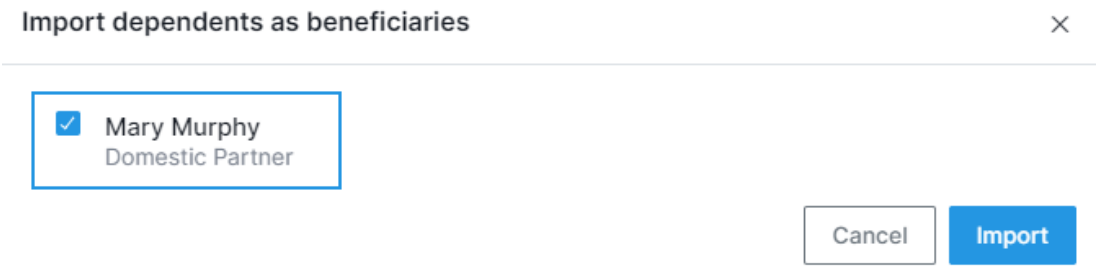


2. Next, click on the **Beneficiaries** tab.

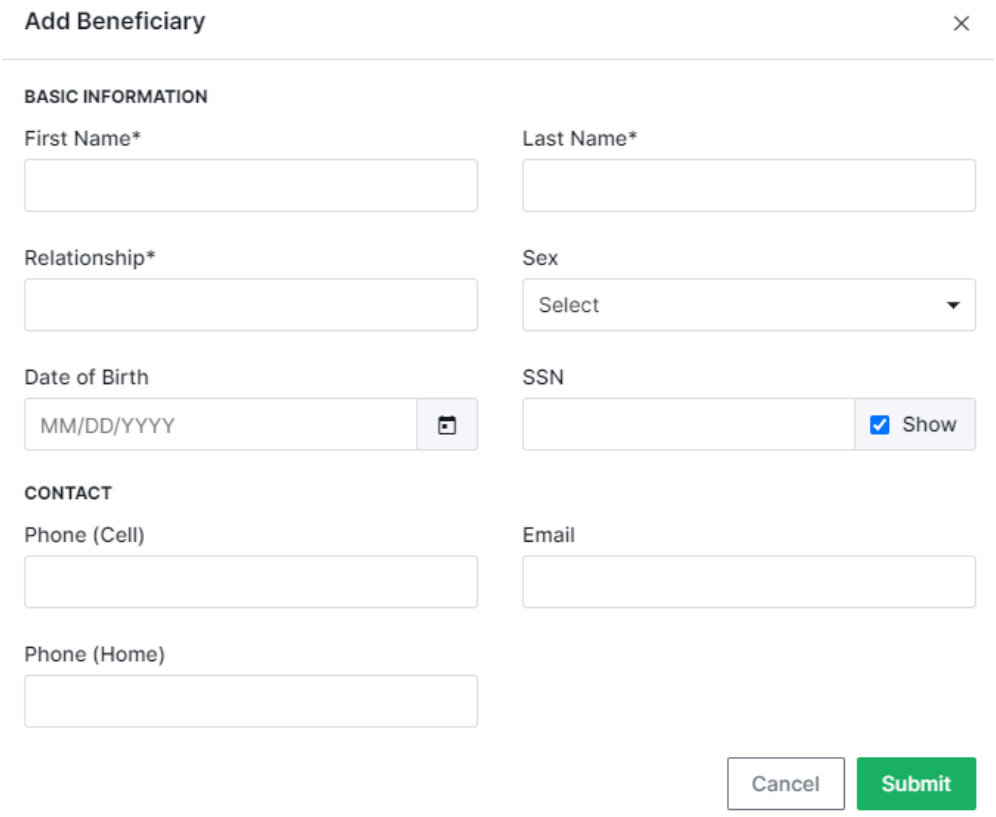
3. If you're adding a beneficiary, click **Add Dependent as Beneficiary** to import one of the dependents already in Flock, or click **Add Beneficiary** to add to add a non-dependent individual. If you are not editing an existing beneficiary, skip to step 5.



4. If clicking **Add Dependent**, select the dependents you wish to add to your beneficiary list. Then, click **Import**.

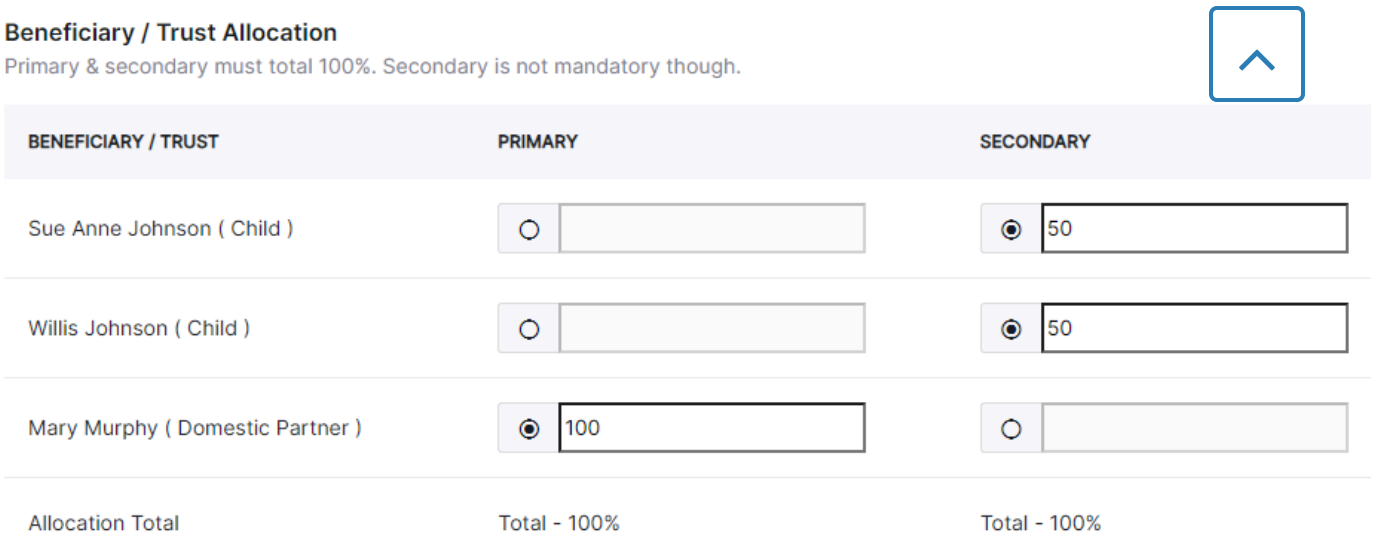


If clicking **Add Beneficiary**, you will be prompted you to provide the necessary information. Note the required items indicated with an asterisk. It is best to provide as much information as possible to avoid confusion when qualifying the individual at the time of claim.



5. Click **Add Trust** if you would like to name an established trust as part of your beneficiary list.

6. Designate an allocation percentage to each beneficiary. It is only required to complete the Primary Allocation column. Primary beneficiaries will be paid first at time of claim. If the primary beneficiary is not available (maybe due to the death of the beneficiary), the secondary allocated individuals will paid at the time of claim. Follow up with your insurance provider for more information.



7. Lastly, remember to click **Submit** to save your changes.

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