

Setting a Trust as a Beneficiary Designee for UF Life Plans

If a minor (a person not of legal age) or your estate is the beneficiary, it may be necessary to have a guardian or a legal representative appointed by the court before any death benefit can be paid. If the beneficiary is a trust, the trustee must be identified in the beneficiary designation.

To designate a trust as a beneficiary, you must enter the trustee's information as a beneficiary. To do so, complete the following steps.

1. Login to my.ufl.edu.
2. Click Main Menu > My Self Service > Benefits > Benefits Summary

Favorites | **Main Menu** > **My Self Service** > **Benefits** > **Benefits Summary**

3. Click the hyperlink of the UF life plan you wish to edit.
4. Click the **Edit** button at the bottom of the screen.
5. Click the **Add a New Beneficiary** button to add a new person to your list of beneficiaries.
6. Add the missing digits of your SSN and your date of birth in the security screen.
7. Add "Trustee" in the **First Name** field.
8. Add the full name (first and last) of the Trustee (or Executor) in the **Last Name** field.

Dependent/Beneficiary Personal Information

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Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Jun 6, 2014.

Personal Information






*First Name:	<input type="text"/>
Middle Name:	<input type="text"/>
*Last Name:	<input type="text"/>
Name Prefix:	<input type="text"/> 
Name Suffix:	<input type="text"/> 
Date of Birth:	<input type="text"/> 
*Gender:	Male 
SSN:	<input type="text"/> (Social Security Number)
*Relationship to Employee:	<input type="text"/> 

Figure 1: Dependent/Beneficiary Personal Information Screen

9. Select the appropriate option for the **Gender** field from the drop down menu. This does not have an impact on the Trustee beneficiary designation, but it is a required field.
10. Select the "Estate" option in the **Relationship to Employee** field from the drop down menu.
11. Input the Address and phone number of the beneficiary in the **Address** and **Phone** fields.
12. Click the **Save** button.
13. Click the **OK** button in the Save Confirmation page.
14. Click the **Return to Change Current Beneficiaries and Allocations** link.
15. Click the **Return to Life Insurance Main** link.

Beneficiary Tips

When selecting a beneficiary, consider the following points:

- Your designation revokes all prior designations.
- Benefits are payable to a contingent beneficiary only if you are not survived by one or more primary beneficiaries.
- If you name two or more beneficiaries in a class (primary or contingent), two or more surviving beneficiaries will share equally, unless you provide for unequal shares.
- A power of attorney must grant specific authority, by the terms of the document or applicable law, to make or change a beneficiary designation. If you have questions, consult your legal advisor.
- Dependents Insurance and Supplemental Life Insurance on your Spouse, if any, is payable to you, if living, or as provided under your Employer's coverage under the Group Policy.
- It is critical that an up-to-date phone number and contact information is listed for any beneficiary designation.