

ERS Online – ERS Beneficiaries

It's important to select the individuals who will receive your retirement account and life insurance benefits in the event of your death. This person is called your beneficiary. You can have more than one beneficiary. Before going online to select your beneficiary, make sure you have your beneficiary's Social Security number (SSN), date of birth, and mailing address.

Click on the 'view beneficiary summary' link to login your ERS Online Account.

Once logged in, click 'Beneficiary Summary' to view and make changes.

VIEW BENEFICIARY SUMMARY

www.ers.state.tx.us/login



Add a new beneficiary

- Click "Change Information or Add New Beneficiary" button,
- Click "Add a New Beneficiary,"
- Enter beneficiary's personal data (Social Security number is required) ,
- Click "Save," and
- Click "Return to Summary of Beneficiaries"

Change a beneficiary

- Review your beneficiary designations,
- Click the blue link under the Plan Description for the benefit you would like to assign,
- Click "Request Designation Change,"
- Select your beneficiary(ies),
- Click "Save Beneficiary Elections,"
- Click "Submit Changes,"
- Receive the beneficiary designation form by email, or mail if you do not have an email address updated on your ERS account.

Complete and return the beneficiary designation form

- Review the form,
- Print and sign your name,
- Have an unrelated witness (not you or the beneficiary) sign his or her name, and
- Return the form to ERS

Your designation is not valid until you receive a confirmation from ERS.

You can change your beneficiaries anytime of the year. You do not have to wait for Annual Enrollment.

Your Texa\$aver Beneficiaries

Texa\$aver needs an original, signed Beneficiary Form in order to distribute your assets according to your wishes when you die. Remember to update your beneficiary in the event of marriage, death, or divorce.

Beneficiary forms

Designate Texa\$aver beneficiaries on the forms below. Complete both forms if you are in both plans.

- [Beneficiary Designation 401\(k\) Plan Form](#)
- [Beneficiary Designation Governmental 457\(b\) Plan Form](#)

Complete the correct form and send it by:

1. Mailing it to the address shown on the form;
2. Scanning and emailing the form to texasaver@empower-retirement.com; or
3. Faxing the form to Texa\$aver at (866) 745-5766.

Contact Texa\$aver with questions about your beneficiary.

NOTE: Beneficiaries for Texas Employees Group Benefits Program life insurance and the ERS Retirement Program are separate from Texa\$aver beneficiaries.

Are you a beneficiary?

If you are designated as a beneficiary, ERS will inform you of the benefits you have, including Texa\$aver account money, after a death has been reported.

Information sourced from ERS Support Link: http://www.ers.state.tx.us/Customer_Support/Online/Account_Beneficiaries/



STEPHEN F. AUSTIN
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Human Resources

Questions about your benefits??? Contact SFA Human Resources at (936) 468-2304 or benefits@sfasu.edu

Or contact ERS directly at (877) 275-4377 toll-free.