

## CBIZ RETIREMENT PLAN SECONDARY BENEFICIARY FORM

### Primary Beneficiary Designation

All CBIZ Retirement Plan participant accounts are posted at [www.massmutual.com/retire](http://www.massmutual.com/retire). **Please post your Primary Beneficiary at this account site.** This is the most important beneficiary designation you will make. Please verify your election at least once a year.

*To record a Primary Beneficiary, log on to [www.massmutual.com/retire](http://www.massmutual.com/retire).  
Enter your Social Security Number (SSN) and Personal Identification Number (PIN)\*.  
Select My Account; Personal Information; Beneficiary Information; add or change beneficiary.  
Record your current primary beneficiary information.*

### Secondary Beneficiary Designation

All participants may choose to name a Secondary Beneficiary. This is the beneficiary of your account upon your death if the Primary Beneficiary is unavailable. The record of your Secondary Beneficiary, however, is retained in your Personnel File in the local Human Resources office.

Please use the space below to record your Secondary Beneficiary. Please date and sign the form. Keep a copy for yourself and forward the completed Original to your Human Resources Representative.

**SECONDARY BENEFICIARY ELECTION:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**CITY/STATE/ZIP:** \_\_\_\_\_

**CURRENT PHONE NUMBER:** \_\_\_\_\_

**PLAN PARTICIPANT SIGNATURE:** \_\_\_\_\_

**DATE OF THIS ELECTION:** \_\_\_\_\_

A primary and/or secondary beneficiary election can be changed at any time at the discretion of the plan participant.

\*If you do not have, or do not remember, the PIN for your MM account, dial 1-800-74FLASH. Work through the following prompts to access a MM Operator: "To continue this call in English, please enter 1." "Please enter only your SSN now." "If you have forgotten your PIN, please press the star key (\*) now". Once you press the star key, through a series of questions and keying, you will establish a new temporary PIN. With this PIN, you can speak with an operator or enter the website.

For Human Resources Use Only:

Please confirm the form is signed/dated (mo/day/yr). File the completed form in the secondary Personnel File for this employee.