

UPDATING YOUR BENEFICIARY INFORMATION

CAPTRUST
— AT WORK —

Why Should You Update Your Beneficiary Information?

Keeping your beneficiary information updated in your retirement plan is crucial to ensure your loved ones are protected and that your wishes are followed.

1

Ensure Your Assets Go to the Right People

If your listed beneficiaries are outdated, your assets might not be distributed as you wish, leading to legal disputes and causing unnecessary stress for your loved ones.

2

Consider Major Life Events

Life events like marriage, divorce, or having children can change your circumstances. It's essential to update your information to reflect these changes, ensuring that your retirement plan aligns with your current life situation.

3

Avoid Delays in Paying Out Benefits

Accurate beneficiary information helps in the smooth and quick payout of benefits. If your information is outdated, it can cause delays, making it harder for your loved ones to access the benefits when they need them most.

4

Protect Your Family's Future

Updating your beneficiary information is a step toward securing your family's future. It provides peace of mind, knowing that your loved ones will be taken care of according to your wishes, without facing financial uncertainty.

Don't wait—review and update your beneficiary information today.

Contact CAPTRUST:

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University System
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