

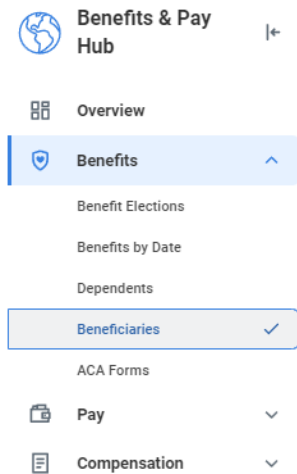
Benefits: Manage Your Beneficiaries

A beneficiary is the person or entity you designate to receive the money from your insurance policy in the event of your death. You can add and edit beneficiaries from the Benefits and Pay hub on your Workday homepage.



ADDING A NEW BENEFICIARY

1. In the left navigation pane, click **Beneficiaries**.

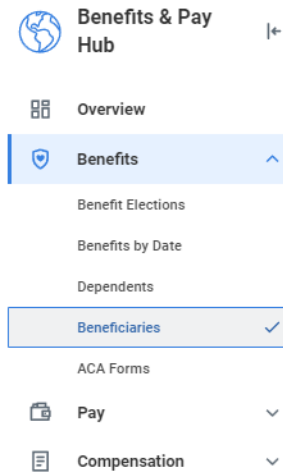


2. Click the **Add** button and the *Add My Beneficiary* page displays.
3. Select **Create a New Beneficiary** or **Create a New Trust as Beneficiary**.
4. Click **OK**.
5. Enter all required information, denoted by a **red** asterisk.
6. Click **Submit**.

UPDATE BENEFICIARY INFORMATION

From the **Benefits and Pay hub**:

1. In the left navigation pane, click **Beneficiaries** and the beneficiaries page will display.



2. Any previously created beneficiaries can be viewed here along with their associated benefit elections. To update information on an existing beneficiary, click **Edit**.



If you originally created the beneficiary by using an existing dependent, then you will need to edit the dependent record instead of the beneficiary.

3. Click the pencil icon to make any necessary edits. Click **Submit**.

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ASSIGNING A BENEFICIARY TO A BENEFITS PLAN

From the **Benefits and Pay hub homepage**:

1. Under Tasks and Reports, click the **Change Benefits** button.

Tasks and Reports



2. From the Change Reason drop-down menu, select **Change Beneficiaries**.
3. Enter the **Beneficiary Change Date**.
4. Click **Submit**, then click **Open** in the pop-up box that appears.
5. Click the **Let's Get Started** button.
6. Answer the Health Information questions if they appear, then click **Continue**. Click **Continue** again on the screen that follows.
7. Click **Manage** at the bottom of the tile for each benefit plan you would like to update.
8. On the **Plans Available** screen, click **Confirm and Continue**.
9. Click **+** for a new line to begin adding Primary and Secondary Beneficiaries. Enter percentage(s), making sure the percentage for each category equals **100%**.
10. Click **Save**.
11. Once you have updated all plans, click **Review and Sign**.

12. Review elections for accuracy. Click the **I Accept** check box to provide an electronic signature, confirming your changes, then click **Submit**.



To update beneficiaries for your retirement plan, please visit [Fidelity's website](#).