

Life Insurance and Retirement Plan Beneficiary Checklist

Have Your Beneficiary Information Ready

You'll need the following information for each beneficiary.

- First and last name
- Address
- Phone number
- Social Security Number
- Date of birth

Further details may be required if you want to name a trust or estate as a beneficiary.

Have your PennCard Ready

You may need your PennCard number, listed beneath your name in larger type, to access information.

Check Your Life Insurance Beneficiaries

- Log into Penn's [online benefits enrollment site](#).
- Click on "My Information."
- Select "Current Benefits."

Your dependents and your beneficiary allocations will appear at the bottom of the screen. You can print or save the information as a PDF for future reference.

Update Your Life Insurance Beneficiaries

- If you want to update your Beneficiary, click on the "Declare Life Event" link. From the drop-down list, select "Beneficiary Designation Change."

If you have any life insurance questions, contact the Penn Benefits Center at 1-888-PENNBEN (1-888-736-6236).

Check and Update Your Retirement Plan Beneficiaries.

- Log into Penn's [retirement enrollment system](#). You'll see your retirement plans and plan carriers listed under Current Contribution Information.
- Print or save the information for future reference.

- Name or update beneficiaries for all of your plans—Basic, Matching, and/or Supplemental—with Vanguard and/or TIAA.

If you have plans with Vanguard:

- Log into your account at <https://retirementplans.vanguard.com>.
- Click “My Profile.”
- Select Beneficiaries from the menu to view and edit your beneficiary information for each of your plans.

To request Vanguard’s beneficiary update forms by phone, call 1-800-523-1188.

If you have plans with TIAA:

- Log into your account at <http://www.tiaa.org>.
- Click on the “Profiles and Settings” link to access and update your beneficiary information for each of your plans.

You can also request beneficiary update forms in the mail or through email by calling 1-877-736-6738.

If you have any retirement plan questions, contact Penn’s Retirement Call Center at 1-877-PENN-RET (1-877-736-6738).