

Beneficiary Designation Form

To designate, revoke, or change a beneficiary, please complete, sign, and date this Beneficiary Designation Form and send it to Pacific Life Insurance Company at the address below. The designation/revocation/change will be effective as of the date this form is received by Pacific Life.

Policy Number: _____ Certificate No.: _____
Your Name: _____ Social Security Number: _____ - _____ - _____
Date of Birth: _____ Marital Status: Single () Married ()
E-Mail: _____ Phone: (____) _____

Please print or type your beneficiary(ies) information below. Attach another form if you require more space. Definitions of terminology and Sample Beneficiary Wording are available on page 2.

Primary Beneficiary

In the event of my death, I designate the following as my PRIMARY BENEFICIARY(IES) for any amount that may be payable after my death:

Name of Primary Beneficiary #1: *(See sample wording on page 2)* _____
Sex: Male () Female () Social Security Number: _____ - _____ - _____ Benefit %: _____
Date of Birth: _____ Phone: (____) _____
Address: _____ Relationship: _____

Name of Primary Beneficiary #2: *(See sample wording on page 2)* _____
Sex: Male () Female () Social Security Number: _____ - _____ - _____ Benefit %: _____
Date of Birth: _____ Phone: (____) _____
Address: _____ Relationship: _____

Secondary Beneficiary

In the event of my death, if my Primary Beneficiary(ies) does/do not survive to receive any remaining payments, I designate the following as my SECONDARY BENEFICIARY:

Name of Secondary Beneficiary: *(See sample wording on page 2)* _____
Sex: Male () Female () Social Security Number: _____ - _____ - _____ Benefit %: _____
Date of Birth: _____ Phone: (____) _____
Address: _____ Relationship: _____

Annuitant Signature: _____ Date: _____



Definitions

Primary Beneficiary —

Anyone listed as a primary beneficiary will receive the benefits first. If more than one person is listed as primary, they will be given the percentage listed. If any of the primary beneficiaries predecease you, their interest in the annuity will be divided equally and paid to the surviving primary beneficiary(ies). If all of the named primary beneficiaries predecease you, then the annuity benefit will be paid to your secondary beneficiary(ies). Split percentages must equal 100%.

Secondary Beneficiary —

The secondary beneficiary(ies) will be paid only if all persons listed as Primary Beneficiary are deceased at the time of your death. If any of the named secondary beneficiaries predecease you, their interest in the annuity will be divided equally and paid to the surviving secondary beneficiary(ies). Split percentages must equal 100%. If all named beneficiaries predecease you, your entire remaining interest in the annuity will be paid to your estate.

Sample Beneficiary Wording

If your beneficiary is...	Then use this wording:
Estate	The Estate of Mary Doe.
One Primary Beneficiary	Mary Doe, Wife.
Several Primary Beneficiaries	Mary Doe, Jane Doe and Thomas Doe, Wife and Children, equally, survivors or survivor.
One Secondary Beneficiary	Thomas Doe, Son.
Two Secondary Beneficiaries	Thomas Doe, Son, and Jane Doe, Daughter, equally or survivor.
Children per Stirpes	Thomas Doe, Mary Doe and Jane Doe, Children equally, survivors or survivor, provided, however, should any said child not survive to receive payment but leave children surviving at the time of payment, his share, her share or their shares to said children per stirpes
Issue per Stirpes	Thomas Doe, Mary Doe and Jane Doe, Children equally, survivors or survivor, provided, however, should any said child not survive to receive payment but leave issue surviving at the time of payment, his share, her share or their shares to said issue per stirpes
Unequal Amounts	70% to Mary Doe, Wife, and 30% to John Doe, Son, or all to the survivor

