



Change of Beneficiary (Not for Pension Plan owned policies)

Massachusetts Mutual Life Insurance Company
and affiliates, Springfield, MA 01111-0001
www.massmutual.com

Policy Number(s) _____

Name of Insured(s) _____

Policyowner's Name _____

The Company is authorized and requested to change the policy(ies) above as provided in this amendment. The Definitions and General Provisions attached are a part of this amendment. Check only ONE box in a beneficiary field and provide the information requested. **Illegible or incomplete forms will be returned.**

Primary Beneficiary (Required) – First to Receive Payment

Estate of Insured. If choosing this option DO NOT enter additional names in the Primary or Secondary Beneficiary fields.
Revocable Irrevocable Trust (*Enter the name of Trust and complete date of Trust*)

Name and Date of Trust

Trustee under Insured's Will (*If choosing this option – Refer to Definitions attached*)

Named Individuals (*Enter the requested information for each individual being named*)

Name (First, Middle Initial, Last)	Relationship	Date of Birth (mm/dd/yyyy)	Social Security Number

Secondary Beneficiary (Optional) – Second to Receive Payment

Revocable Trust Irrevocable Trust (*Enter the name of Trust and complete date of Trust*)

Name and Date of Trust

Trustee under Insured's Will (*If choosing this option-Refer to Definitions attached*)

Named Individuals (*Enter the requested information for each individual being named*)

Name (First, Middle Initial, Last)	Relationship	Date of Birth (mm/dd/yyyy)	Social Security Number

Optional Provisions

UTMA/UGMA Custodian – During the named child(ren)'s minority. _____ shall be
(Name of adult to act as custodian)
custodian for said child(ren) under the _____ Uniform Gifts/Transfers to Minors Act.
(State where either the owner, custodian or child(ren) live)

“UTMA/UGMA” means the Law of the named state, which applies to a gift of insurance proceeds to a minor whether it is entitled Uniform Transfers to Minors Act or Uniform Gifts to Minors Act. Custodial arrangements are not available in the state of Vermont.

Children's Clause (*only applicable if the beneficiary is a person*)

- Primary Beneficiary
- Secondary Beneficiary

“Children's Clause” means that if a beneficiary dies before the insured, any amount that would have been paid to that beneficiary, if living, will be paid in one sum and in equal shares to the surviving children of that beneficiary. If this clause is elected, payment of that amount will be made to the surviving children, if any, before any other contingent beneficiary.

