Update Your Beneficiaries Online

Updating your beneficiaries online is easy and secure. This feature allows for immediate updates and provides an email notification when you make changes.

Simply log into your online account, choose the account you want to update and select “Beneficiaries.” From there you can view your Primary and Contingent beneficiary selections and modify your beneficiaries. As part of our security practices, you will be required to enter a verification code to modify your beneficiaries. If you have multiple accounts, you will need to update each account. Updating one account will not automatically update the other(s). The individual(s) you select as beneficiary(ies) will remain the same until you change that designation. Accounts with no known beneficiaries will default to your Estate as the beneficiary.

You can also add or remove beneficiaries. For individuals, you must include the beneficiary’s social security number, relationship, date of birth, and percentage. When complete, you will receive an email confirming you have changed your beneficiary information. To select a Trust or Charity as a beneficiary, you must complete a paper Beneficiary Form located on the “Forms & Help” page.

If you have questions, please contact our Service Center at 877-644-6457.