

## Instructions for Completing Annuitant COE

1. Fill in the deceased **Member's Name**.
2. Fill in the deceased **Member's Social Security Number**.
3. Fill in the **Annuitant's Name**.
4. Fill in the **Annuitant's Social Security Number**.
5. Place an **"X" in the applicable box** for the **Annuitant Relationship to member noted above**.
6. Fill in the Annuitant's **date of birth** (MM/DD/YYYY)
7. Place an **"X" in the applicable box** for the **Annuitant's marital status** and provide the corresponding information.
8. Provide new mailing address if the annuitant's or legal representative of the annuitant address has changed.
9. If you are the **annuitant** completing the COE, please sign and date in **box A**. Stop here, the certificate is complete.
10. If you are the **Parent/Guardian or Legal Representative** of a minor child or **Legal Representative** of an incapacitated annuitant complete **box B**.
11. **B-1. Place an 'X'** in the applicable box.
12. **B-2. Provide the name** of the parent/guardian or legal representative and EIN, if applicable.
13. **B-3. Sign and date** and **include a photocopy of the legal document** or order granting the authority to act on the annuitant's behalf, if not provided previously.