

HOW TO HELP YOUR SURVIVING BENEFICIARIES

It is important to plan ahead for end of life. Summarized below are suggested tips and resources to help you and your surviving loved ones be prepared to take on the transactional details of one's passing.

TIPS



Create a Survivor Folder

Create a folder that includes important documents such as UC Retirement plan final documents noting benefit election, health and welfare benefits, a will, living trust, health care directives, your spouse's and/or children or beneficiaries birth certificates, marriages, evidence of name changes, social security numbers, key UC contacts and resources.



Update Beneficiaries

Ensure that you have updated your beneficiary designations and keep them up to date using your UCRAYS self service account so that the loved ones that you intend to receive your benefits are listed. Notify beneficiaries so that they can expect the benefits they may receive in the future.



Identify a Point of Contact

Designate a point of contact from your loved ones who will manage the interactions with UC's Retirement Administration Services Center (RASC). It is often recommended to not be your grieving spouse.



Report the Death

Communicate with your loved ones the need to report the death to the RASC, local UC campus benefits office or retirement center as soon as possible to avoid delays in processing beneficiary benefits.



Order Death Certificates

Prepare your loved one to order multiple death certificates which can be retrieved from the vital records office in the state where the death occurred, city hall or other records office. It is recommended to order twelve or more death certificates.

RESOURCES

RASC – Retirement Administration Services Center is the central location for UC retirement information and can be reached at (800) 888-8267

RASC Survivor & Beneficiary Support Team – The RASC has a dedicated line for all things survivor and beneficiary related and can be reached at 1-888-825-6833

Fidelity Retirement Services – Fidelity offers UC Retirement Savings Programs and it is important to notify them of a death and inquire about plan balances, if any at (866) 682-7787

Social Security Office – Social Security is another possible source of survivor benefits and should be contacted to inform them of a death at (800) 772-1213 or ssa.gov

Your Guide to Survivor and Beneficiary Benefits - This booklet will provide loved ones with detailed information on survivor and beneficiary benefits and guided steps through the survivor process at <https://ucnet.universityofcalifornia.edu/forms/pdf/survivor-beneficiary-handbook-for-family-members-beneficiaries-of-uc-retirees--members-receiving-ucrp-disability-benefits.pdf>

UC RAYS – UC Retirement At Your Service is a self-service portal for UC retirees and emeriti to access their retirement account and update beneficiary information at <https://retirementatyoursevice.ucop.edu/UCRAYS/Account/LoginE?ReturnUrl=%2fUCRAYS>

UCR Healthcare Facilitator – The Healthcare Facilitator assists UCR retirees, emeriti, surviving spouse/domestic partners and beneficiaries obtain full health benefits and can report a death to the RASC at (951) 827-2636 or benefits@ucr.edu

UCR Retirement Center – The center serves as the official link between UCR retirees, emeriti, surviving spouses/domestic partners, beneficiaries and UCR and can assist loved ones in reporting a death to the RASC at (951) 827-5008 or retirees@ucr.edu

