

# Personnel Employee Bulletin

March 4, 2009

## Thrift Savings Plan (TSP) Beneficiary Forms

Designation of Beneficiary, Form TSP-3 provides active and separated TSP participants the ability to designate a beneficiary or beneficiaries to receive their TSP account balances after their deaths. If the TSP record keeper has a valid Form TSP-3 on file, the TSP will use the form to identify the employee's beneficiaries and disburse the death benefits payments from his/her TSP account. A TSP-3 form is considered valid if has been signed, witnessed and received by TSP **on or before** the date of the employee's death.

Since September 1995, the TSP has required that, in order to be considered, all completed Forms TSP-3 must be received by the TSP records keeper on or before the date of the employee's death. TSP reminds agency representatives that it will not honor a Form TSP-3 received after the employee's date of death, even if it was transmitted from the agency.

The employee must submit Form TSP-3 directly to the TSP record keeper. Employees are encouraged to fax the form directly to TSP at 1-866-817-5023. If they fax the form, they are not required to mail the form. If they decide to mail the form, the address is:

Thrift Savings Plan  
P.O. Box 385021  
Birmingham, AL 35238  
Fax: 1-866817-5023

Employees are responsible for ensuring their Form TSP -3 is completed correctly and that it accurately reflects the beneficiaries they wish to designate. As life situations change, employees should review their TSP-3 Beneficiary form to consider whether they would like to submit an updated form.

If a valid form is not on file at the time of the death of the employee, the TSP will disburse the account according to the statutory order of precedence found at 5 USC 8424(d), as follows:

- (1) To the employee's widow or widower;
- (2) If none, to the employee's child or children equally, and descendants of deceased children by representation;
- (3) If none, to the employee's parents equally or to the surviving parent;
- (4) If none, to the appointed executor or administrator of the employee's estate.
- (5) If none, to the employee's next of kin entitled to his or her estate under the laws of the state in which the participant resided at the time of his or her death.

**Note for those with a uniformed services TSP account:** Employees with a uniformed services TSP account must file Form TSP-U-3 to designate a beneficiary to receive death benefits from that account upon their death. The TSP will not use Form TSP-3 for a uniformed services account. If there is no Form TSP-U-3 on file for the employee's uniformed services account, the death benefit payment will be made according to the statutory order of precedence.

TSP beneficiary forms may be found at [www.tsp.gov](http://www.tsp.gov), under forms.

For additional information, please contact your servicing DLA Human Resources Center, <http://www.hr.dla.mil/cntctus.htm>. The Personnel Employee Bulletin will be published on the first Wednesday of each month.