



How to Update Your Employee's Beneficiaries

If you have Benefit Administrator or Security Administrator access rights, you can update your employees' beneficiaries for them from your employer website. If you need Benefit Administrator access, please contact the Security Administrator for your employer.

1. Sign into your employer website at TCDRS.org, then click "Employee Accounts".
2. Enter the Social Security number for the employee.
3. Click the "View Beneficiaries" button.

4. From here, you can
 - a. Edit or remove the employee's current beneficiaries
 - b. Add a beneficiary

5. Enter the beneficiary data in the fields. The beneficiary's first and last name, beneficiary relationship and birth date are required information.

Add Beneficiary

To redistribute shares among beneficiaries you will be directed to "Edit Shares" after adding this new beneficiary.

5

First Name

Elaina

Middle Name

Middle Name

Last Name

Granite

Beneficiary Relationship

Child

Suffix

select

Share

0%

Beneficiary Birth Date

01/01/2001

Social Security Number

XXX-XX-XXXX

Gender

☒ Female☐ Male

Next

Cancel

6. Distribute the benefit shares between beneficiaries. The total must equal 100%. Then click "Done".

Primary Beneficiaries

Name	Relationship	Share
Ellen Granite	Spouse	100 %

Edit Shares

Distribute evenly

Ellen Granite	Spouse	50 %
Elaina Granite	Child	50 %
Share Total		100.00%

6

Done

Cancel

7. Once you have made the requested changes, click "Next".

ACCOUNT BENEFICIARIES

Chris Granite (0000000000)

Below you can edit an existing beneficiary or add a new beneficiary for your employee. You can also adjust shares between beneficiaries.

We will need an email address for this employee to complete the request. Once you submit the request, your employee will receive a DocuSign certification via email. They will need to provide their electronic signature to complete the request.

Please keep in mind that this update only applies to this account. If your employee has multiple TCDRS accounts, they will need to update their beneficiaries either through their online member account or by calling Member Services.

Remove withdrawal option for beneficiaries

☒ No☐ Yes

Primary Beneficiaries

Name	Relationship	Share
Ellen Granite	Spouse	50 %
Elaina Granite	Child	50 %

+ Add a primary beneficiary

Alternate Beneficiaries

Name	Relationship	Share
No beneficiaries have been designated.		

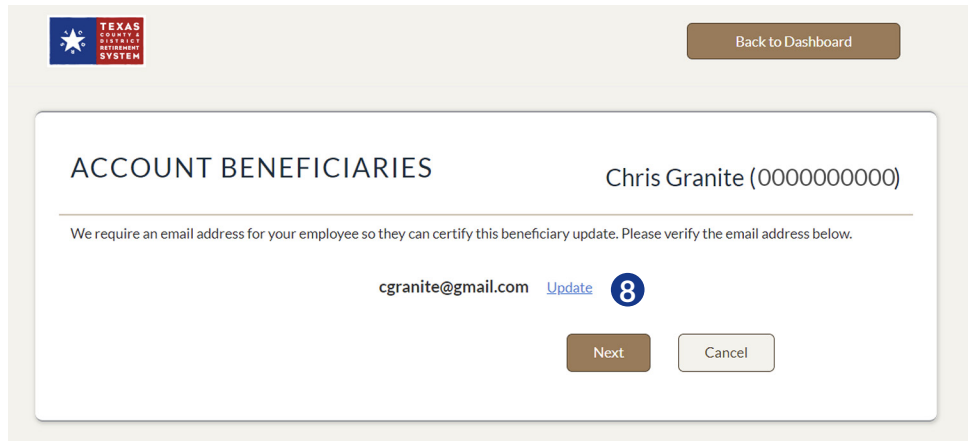
+ Add an alternate beneficiary

7

Next

Cancel

8. We require an email address for your employee so we can certify the beneficiary update. If the email address shown is correct, click “Next”. If you need to make a change, click “Update”. If there is no email address, you can add one here.



TEXAS COURT DISTRICT RETIREMENT SYSTEM

Back to Dashboard

ACCOUNT BENEFICIARIES

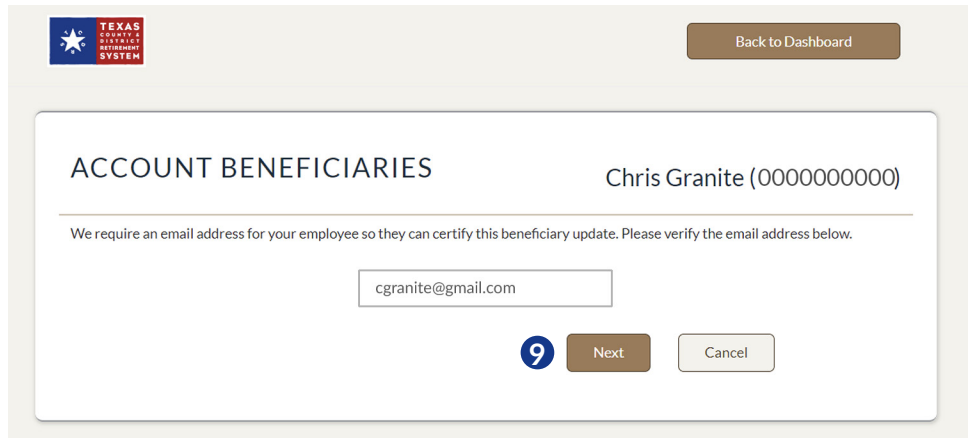
Chris Granite (0000000000)

We require an email address for your employee so they can certify this beneficiary update. Please verify the email address below.

cgranite@gmail.com [Update](#) 8

Next Cancel

9. Enter the employee's new email address and click “Next”.



TEXAS COURT DISTRICT RETIREMENT SYSTEM

Back to Dashboard

ACCOUNT BENEFICIARIES

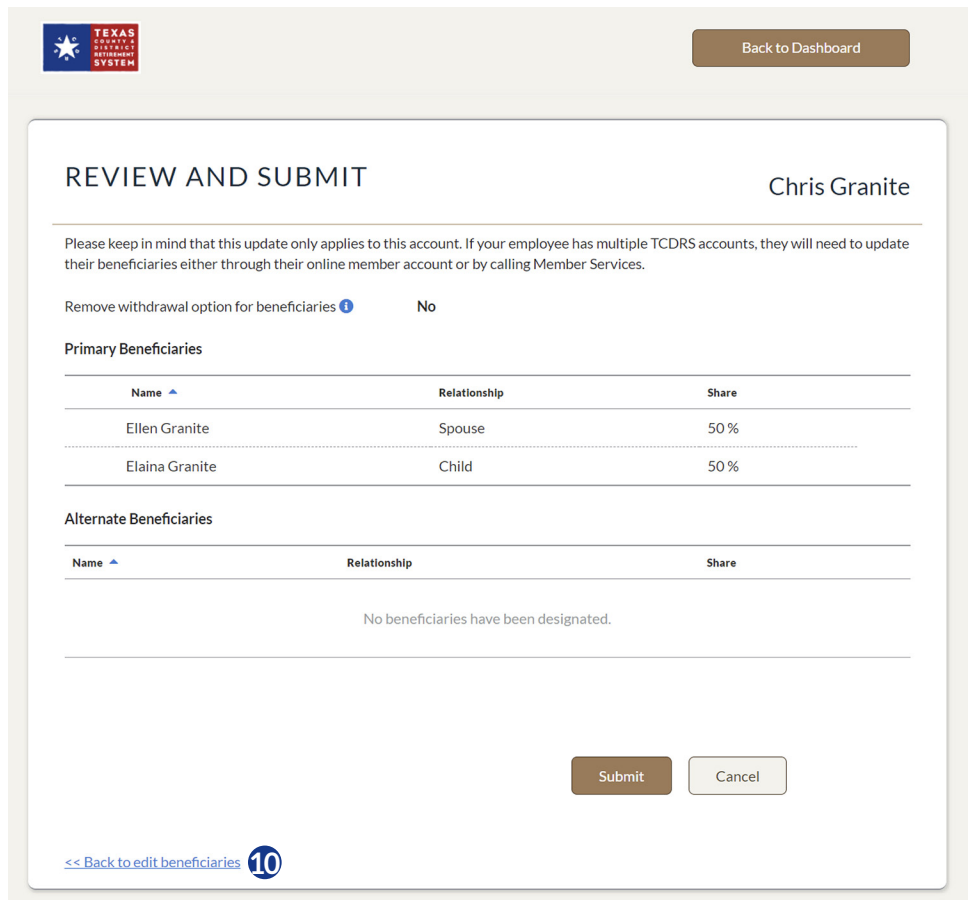
Chris Granite (0000000000)

We require an email address for your employee so they can certify this beneficiary update. Please verify the email address below.

cgranite@gmail.com

9 Next Cancel

10. Double-check the beneficiary updates. If you need to make additional changes, click “<<Back to edit beneficiaries”.



TEXAS COURT DISTRICT RETIREMENT SYSTEM

Back to Dashboard

REVIEW AND SUBMIT

Chris Granite

Please keep in mind that this update only applies to this account. If your employee has multiple TCDRS accounts, they will need to update their beneficiaries either through their online member account or by calling Member Services.

Remove withdrawal option for beneficiaries ⓘ No

Primary Beneficiaries

Name ▲	Relationship	Share
Ellen Granite	Spouse	50 %
Elaina Granite	Child	50 %

Alternate Beneficiaries

Name ▲	Relationship	Share
No beneficiaries have been designated.		

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Submit Cancel

11. When the updates are complete, click “Submit”.

12. TCDRS will send your employee a DocuSign certification via email. The certification is password protected. **The employee must complete the DocuSign certification for the change to take effect.**

Your employee will receive final confirmation from TCDRS once the update is made.

TEXAS
LEGISLATIVE
DISTRICT
REPRESENTATIVE
SYSTEM

Back to Dashboard

REVIEW AND SUBMIT

Chris Granite

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Remove withdrawal option for beneficiaries ⓘ No

Primary Beneficiaries

Name ▲	Relationship	Share
Ellen Granite	Spouse	50 %
Elaina Granite	Child	50 %

Alternate Beneficiaries

Name ▲	Relationship	Share
No beneficiaries have been designated.		

11 Submit Cancel

[<< Back to edit beneficiaries](#)

13. You can view your activity in “Portal Activity”.

INVESTMENTS ABOUT US NEWS & PUBLICATIONS FORMS EMPLOYERS MEMBERS

PORTAL ACTIVITY

Filter By:

USER ID:

DATE RANGE: 04-25-2022 TO 05-10-2022

USER LOGON:

ACTIVITY TYPE: All

SUBMIT

USER ID	USER LOGON	DATE CREATED	ACTIVITY TYPE
secadmin319_100		05-10-2022 5:15:24 PM	EmployerUpdatedEmployeeBeneficiaries
secadmin319_100		05-10-2022 5:13:18 PM	EmployerViewedEmployeeBeneficiaries
secadmin319_100		05-10-2022 5:13:03 PM	EmployerViewedEmployeeBeneficiaries

If you have any questions or need help, please call
TCDRS Employer Services at 800-651-3848.