

Update Your UC Beneficiary Designations

As many of you know, updating or entering beneficiary information is now an easy task because it can be done online. Beneficiary designations are important because they allow the wishes of the deceased to be carried out efficiently and swiftly. Therefore, it is important that beneficiary designations be completed and reviewed on a regular basis. It is particularly crucial to review these designations when certain life events occur, such as a birth/adoption, marriage, divorce, or the death of a family member.

"At Your Service" Website: <http://atyourservice.ucop.edu/>

The "At Your Service" website is the online location to designate your beneficiary for the UC Retirement Plan (UCRP), Capital Accumulation Provision (CAP), life insurance plans, Accidental Death & Dismemberment Plan (AD&D), and Business Travel Insurance. To access the beneficiary designation for these plans, follow these steps:

1. Choose the link for "Your Benefits Online"
2. Enter your Social Security number or a username that you have created
3. Enter your UC password
4. Select the "View Your Beneficiaries" link
5. Follow the instructions to enter information or make changes

Please contact the Benefits Office at extension 2489 or 2042 if you have questions or need assistance with the "At Your Service" website.

"NetBenefits" Website: <https://www.netbenefits.fidelity.com/>

The beneficiary designation for the University's Defined Contribution Plan (DCP), Tax-Deferred 403(b) Plan, and 457(b) Deferred Compensation Plan is also online.

Fidelity Investments Tax-Exempt Services Company (FITSCo) is now the record keeper for these three plans (collectively known as the Retirement Savings Program, or RSVP). The beneficiary designation is found on the FITSCo website, called "NetBenefits". Reviewing this designation is particularly important for those who had beneficiary designations for Fidelity and Calvert 403(b) accounts. As was mentioned in the transition information that employees received in May or June, there may have been some changes to these designations when the records were transitioned to FITSCo in July. To access the beneficiary designation for these plans, follow these steps:

1. Establish a Fidelity PIN code.
2. When you have logged on to your account, select the link "Your Profile".

3. Select "Beneficiaries".
4. Follow the instructions to enter data or make changes.

For assistance with the NetBenefits website, please contact FITSCo's toll free number at 1-866-682-7787.