



INSTRUCTIONS AND IMPORTANT INFORMATION FOR COMPLETING FORM PENS.A/2

DESIGNATION OF RECIPIENT(S) OF A RESIDUAL SETTLEMENT AND ANY RETROACTIVE BENEFIT DUE under article 38 of the UNJSPF Regulations and section J.3 of the Administrative Rules

PURPOSE OF FORM PENS.A/2

All participants in the Fund are encouraged to complete form PENS.A/2 to specify the recipient(s) of any residual settlement that may become due under article 38 of the UNJSPF Regulations, Rules and Pension Adjustment System and section B.5 of the UNJSPF Administrative Rules, as well as of any retroactive due but unpaid benefit owing to them at the time of their death under section J.3 of the UNJSPF Administrative Rules.

In the absence of the form, these amounts will be paid to the estate of the deceased participant.

IMPORTANT NOTES

Please do not fill out form PENS.A/2 until you have read the notes below

The information provided below is subject to change. For updated information, please refer to www.unjspf.org/for-clients/residual-settlements and section J.3 of the UNJSPF Administrative Rules.

WHEN DOES A RESIDUAL SETTLEMENT BECOME PAYABLE?

A residual settlement becomes payable if:

- (a) The participant died in service and had no survivors (e.g. a spouse, former spouse, child under the age of 21, disabled child or secondary dependant) who are entitled to a benefit under articles 34, 35 *bis*, 35 *ter*, 36 or 37 of the UNJSPF Regulations;
- (b) The participant died after service but before electing a benefit, provided that he or she had five years or more of contributory service and no survivors (e.g. a spouse, former spouse, child under the age of 21, disabled child or secondary dependant) who are entitled to a benefit under articles 34, 35 *bis*, 35 *ter*, 36 or 37 of the UNJSPF Regulations;
- (c) The participant died during entitlement to a retirement, early retirement, deferred retirement or disability benefit, provided that (i) no further benefits are payable to his or her survivors (e.g. a spouse, former spouse, child under the age of 21, disabled child or secondary dependant) who are entitled to benefits under articles 34, 35 *bis*, 35 *ter*, 36 or 37 of the UNJSPF Regulations; and (ii) the total amount of the benefits already paid to and on account of the deceased participant was less than the participant's own contributions plus interest;
- (d) The participant had survivors (e.g. a spouse, former spouse, child under the age of 21, disabled child or secondary dependant) who are entitled to a benefit under articles 34, 35 *bis*, 35 *ter*, 36 or 37 of the UNJSPF Regulations and, following the death of the participant and the death or termination of entitlement of all survivors, the total amount paid by the Fund is less than the amount of the participant's own contributions plus interest.

WHEN DOES A RETROACTIVE DUE BUT UNPAID BENEFIT ARISE?

A retroactive due but unpaid benefit arises if, at the time of the participant's death, a benefit was payable but had not yet been disbursed to the participant. Such benefits include retirement, early retirement, deferred retirement and disability benefits or a withdrawal settlement that was due but not paid at the time of the participant's death, including payments that may have been returned by the participant's bank but were properly payable.

WHO CAN BE DESIGNATED AS A RECIPIENT ON FORM PENS.A/2?

You may designate any individual or institution as your recipient(s). If you designate an institution, you must confirm with that entity that it is able to receive donations as a designated recipient. If the Fund is unable to make the payment to a designated institution or the institution refuses to accept the payment, the amount will be distributed among any other surviving designated recipients when payment is due in the ratio of their own shares or, failing such surviving designated recipients, to your estate.

HOW MANY RECIPIENTS CAN BE DESIGNATED?

You can designate as many recipients as you wish. If more than one recipient is designated, the recipients will share the residual settlement and/or retroactive due but unpaid benefit equally, unless otherwise indicated. The share of a designated recipient who may predecease you will be distributed among any surviving designated recipients in the ratio of their own shares.

WHAT WILL HAPPEN IF YOU DO NOT COMPLETE FORM PENS.A/2?

If there is **no duly completed, dated and signed** PENS.A/2 in the Fund's records, any residual settlement and/or retroactive due but unpaid benefit will be paid to your estate.

This information is provided to assist you in completing form PENS.A/2. If there is any ambiguity, inconsistency or conflict between the information provided herein and the UNJSPF Regulations, Rules and Pension Adjustment System, the Regulations, Rules and Pension Adjustment System shall prevail.

INSTRUCTIONS

Please do not fill out form PENS.A/2 until you have read the instructions below

Before completing the form, please read article 38 of the UNJSPF Regulations and sections B.5 and J.3 of the UNJSPF Administrative Rules, available at www.unjspf.org/resources/regulations-and-rules.

Please type or print the information in BLOCK LETTERS when filling in the form. All pages must be dated and signed.

SECTION 1: PARTICIPANT INFORMATION

Please provide your Unique Identification number (UID), full name, date of birth and contact information. If you do not know your Unique Identification number, please send an email to requestUIDOnly@unjspf.org.

If you are a participant, you must request your Unique Identification number by sending an email from your work email address, as this will serve as verification of your identity. Please include your index number and/or six-digit Pension Fund number in your email request.

If you separated and no longer have access to your work email address, you must include the following information in your email so that the member self-service (MSS) support team can verify your identity and assist you: your full name, your last employing organization before separation from service, your last duty station and your five-digit alphanumeric retirement number.

For further details, please consult www.unjspf.org/for-clients/unique-identification-number.

The pension number field is a required field on the form. Your pension number can be found on your pension statement or in the welcome letter from UNJSPF. Your new designation will be applicable to the pension number (participation account) that you specify in this field.

The retirement number field is optional. Your retirement number can be found in your benefit letter from UNJSPF.

SECTION 2: DESIGNATION OF RECIPIENT(S)

Please provide the full name of the recipient(s), exactly as shown on his or her passport or official Government-issued photo ID, as well as the date of birth, sex and contact information of the recipient(s). Please also state his or her relationship to you and any additional information.

Please clearly indicate the share of the recipient(s). Multiple shares must total 100 per cent. If shares are not indicated or do not total 100 per cent, multiple recipients will share equally.

If you choose to designate a minor, under the additional information field, please provide the contact information of the **parent or appointed legal guardian who has custody of the minor**.

If the recipient is an institution, under the additional information field, please provide the full name and contact information of the institution. Please also provide the registration or identification number of the institution and the full name and contact information of a contact person on a separate page.

If you designate more than four recipients, please check the appropriate box at the end of section 2 and attach any additional duly dated and hand-signed sheet(s). The date must be the same as on form PENS.A/2.

SECTION 3: ACKNOWLEDGEMENT AND SIGNATURE

The form must be completed in full, dated and signed to be valid.

You may alter your designation of a recipient at any time by submitting a new form, which will supersede all previous designations.

It is suggested that you keep a copy of the completed form with your other important documents.

If you require further information or guidance, please contact the secretary of your Staff Pension Committee or UNJSPF if you are a retiree or staff member of the United Nations family, for example the United Nations Secretariat, UNDP, UNFPA, UNHCR or UNICEF.

It is your responsibility to keep your designation up-to-date so that it always reflects your current situation. You may be required to update your designation as a result of life events, such as a change in your marital or family status. A new form must be completed for **each new participation** in the Fund.

SECTION 4: SIGNATURE AUTHENTICATION

This section is **only** applicable if one of the recipients designated is an institution. For UNJSPF to accept your signature as duly authenticated, you must affix your signature and the date in the presence of an authenticating official (e.g. a United Nations official, government official or notary public). The person authenticating your signature must complete all fields in this section: printed full name; email address; official title, licence or index number; original ink signature; authentication date (which must match the date you are signing the form); and official stamp/seal of office. For further information, please refer to www.unjspf.org/for-clients/authentication-of-signatures-documents.

HOW TO SUBMIT FORM PENS.A/2

The dated and hand-signed form must be returned to the secretary of your Staff Pension Committee or to UNJSPF if you are a retiree or a staff member of the United Nations family.

Most registered users of MSS can submit UNJSPF forms and other documentation electronically under the “MSS Document Upload” tab of their MSS account. Users must download the relevant UNJSPF form under the “E-Forms” tab and complete, print, date and hand sign it. Then they must scan the form and upload it, either in JPG, JPEG or PDF format, and send it to UNJSPF. Once the form has been successfully submitted, there is **NO NEED** to submit a physical version of the form to UNJSPF. Go to the “About member self-service (MSS)” web page, available at www.unjspf.org/resources/about-member-self-service, for a tutorial on how to upload documents using MSS.

Please note that access to the “MSS Document Upload” tab may be restricted, at the request of some UNJSPF member organizations. In such cases, the staff of such organizations will not see the “MSS Document Upload” tab as one of the MSS menu options. In any case, all participants should first check with their employing organization to ascertain the correct process for submitting documents to UNJSPF.

You can also mail the physical form, which must be duly completed, dated and hand-signed, directly to UNJSPF at any of the addresses below:

If documents are sent by regular postal mail to the New York Office	If documents are sent by express courier (e.g. DHL) or registered mail to the New York Office	If documents are sent to the Geneva Office (by either postal mail or express courier)
United Nations Joint Staff Pension Fund c/o United Nations PO Box 5036, New York, NY 10163-5036 United States of America	United Nations Joint Staff Pension Fund 37th floor, 1 DHP 885 Second Avenue, New York, NY 10017 United States of America	United Nations Joint Staff Pension Fund s/c Palais des Nations 1211 Genève 10 Suisse