Beneficiary Designation and Changes Tutorial

I. CIGNA Life Insurance Plan Beneficiary Review

- Please take this opportunity to review and update your beneficiaries for your Life and Accidental Death & Dismemberment (AD&D), and Employee Supplemental Life insurance.
  - Log in to Workday and Click on 'Benefits' from the homepage.
  - Under 'Change' select 'Benefits'
    - Select 'Change Beneficiaries' as your Benefit Event Type
    - Enter today's date as the Benefit Event Date
    - Click Submit
  - Select 'Open' under 'Change Benefit Elections'
  - Enter or update your beneficiary designations:
    - To add a new beneficiary click the '+' icon
      - You can either select a beneficiary that has already been listed or you can create someone completely new
    - To remove a beneficiary click the '-' icon
  - Enter the percentage amounts next to each beneficiary
    - You must have at least one beneficiary listed for each benefit plan you are enrolled in, and the percentages for each plan must equal 100%
    - If you add contingent (secondary) beneficiaries, the percentages you assign to all of them must also add up to 100%
  - Review your selected benefit elections and click 'I Agree' and 'Submit'.
    - **NOTE:** You are automatically designated as the beneficiary for any supplemental life insurance you elect for your spouse, domestic partner and/or child(ren). No action is required.

- To view the full step by step process with screen shots, please see Change Beneficiaries Workday Quick Reference Guide.

- For assistance with updating your life insurance beneficiaries, call HRSource at 888-VMWARE8 option US Benefits.

II. E*TRADE Beneficiary Review – Online Update

- E*TRADE now offers beneficiary management online. Please take this opportunity to review and update your beneficiaries for your E*TRADE account.
- Log in to your E*TRADE account at https://us.etrade.com
  - Select the Accounts title on the top left of your screen
  - In the upper, gray 'Welcome, YOUR NAME' box, select the option for 'Account Preferences'
    - Find the option for Account Beneficiaries; Select View/Edit >> (Top section four rows down)
    - Complete your Primary & Contingent Beneficiaries following the instructions on this screen
      a. **NOTE:** If you have previously completed and sent in a beneficiary form to E*TRADE, your beneficiary information does not automatically load onto their web portal. We suggest updating your information online so you have line of sight to the most up to date beneficiary information.
      b. Beneficiary data will be applied to all accounts across E*TRADE

- For assistance with updating your E*TRADE account, call E*TRADE directly at 1-800-ETRADE-1 (1-800-387-2331)

III. HealthEquity Health Savings Account (HSA) Beneficiary Review

- Please take this opportunity to review and update your beneficiaries for your HealthEquity managed Health Savings Account (HSA)
- Through Workspace ONE, click on the Benefits: Health Equity icon. You may also access the site directly at https://my.healthequity.com/ClientLogin.aspx
    - Hover over My Account → Add Individuals and select 'Beneficiaries'
    - Select your marital status.
        - If you are married but designating someone other than your spouse to be the primary beneficiary and you live in a community property state, HealthEquity requires a signature from your spouse on a Beneficiary Designation Form provided to you on the Beneficiaries screen.
    - Enter the required information, which includes: Name, Date of Birth, and address for each individual.
- For assistance with updating your HSA account, call HealthEquity directly at 1-866-296-2857

IV. VMware 401(k) Beneficiary Review

- Please take this opportunity to review and update your beneficiaries for your VMware 401(k) plan
- Through Workspace ONE, click on the Benefits: Fidelity 401(k) icon. You may also access the site directly at www.401k.com
    - Click on Profile option on the top right of the homepage
    - Click on the Beneficiaries link
    - Verify and update your marital status if needed by clicking edit.
    - Update your beneficiaries by clicking edit.
    - To edit a current beneficiary, click edit next to the person(s) name. To add a new primary beneficiary, click "Add another Primary Beneficiary." To add a new contingent beneficiary, click "Add a Contingent Beneficiary."
        - **NOTE:** If you are married and are selecting a non-spousal primary beneficiary, spousal consent is required.
    - Select Save All
    - Review and check the box to agree to consent terms
    - Select Save Choices & Finish
- For assistance with updating your 401(k) account, call Fidelity directly at 1-800-835-5095

V. VMware Non-Qualified Deferred Compensation (NQDC) Plan Beneficiary Review

- Please take this opportunity to review and update your beneficiaries for your Non-Qualified Deferred Compensation plan.
- Through Workspace ONE, click on the Benefits: Fidelity icon. You may also access the site directly at NetBenefits
    - Click on Profile option on the top right of the homepage
    - Click on the Beneficiaries link

- Verify and update your marital status if needed by clicking edit.
- Update your beneficiaries by clicking edit.
- To edit a current beneficiary, click edit next to the person(s) name. To add a new primary beneficiary, click “Add another Primary Beneficiary.” To add a new contingent beneficiary, click “Add a Contingent Beneficiary.”
- Select Save All
- Review and check the box to agree to consent terms
- Select Save Choices & Finish

➢ For assistance with updating your Non-Qualified Deferred Compensation account, call Fidelity directly at 1-800-835-5095