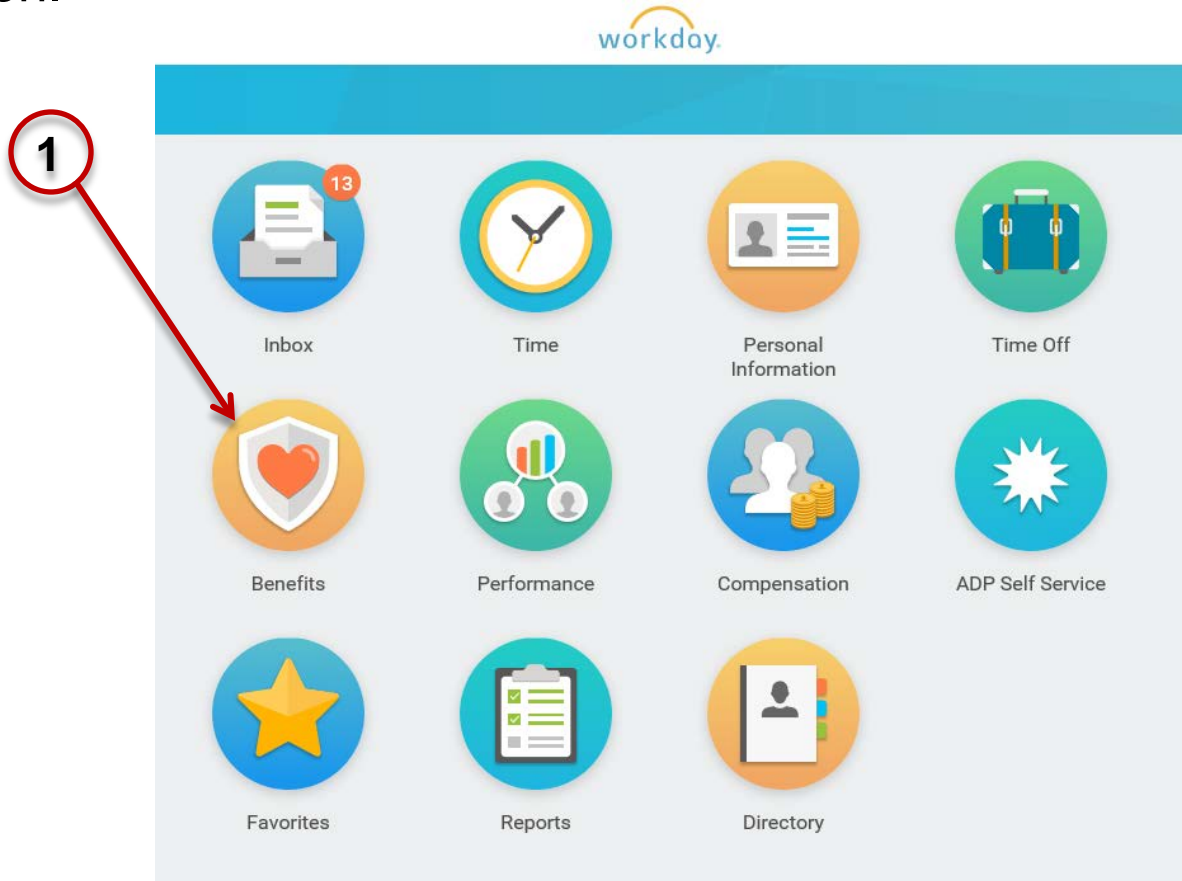


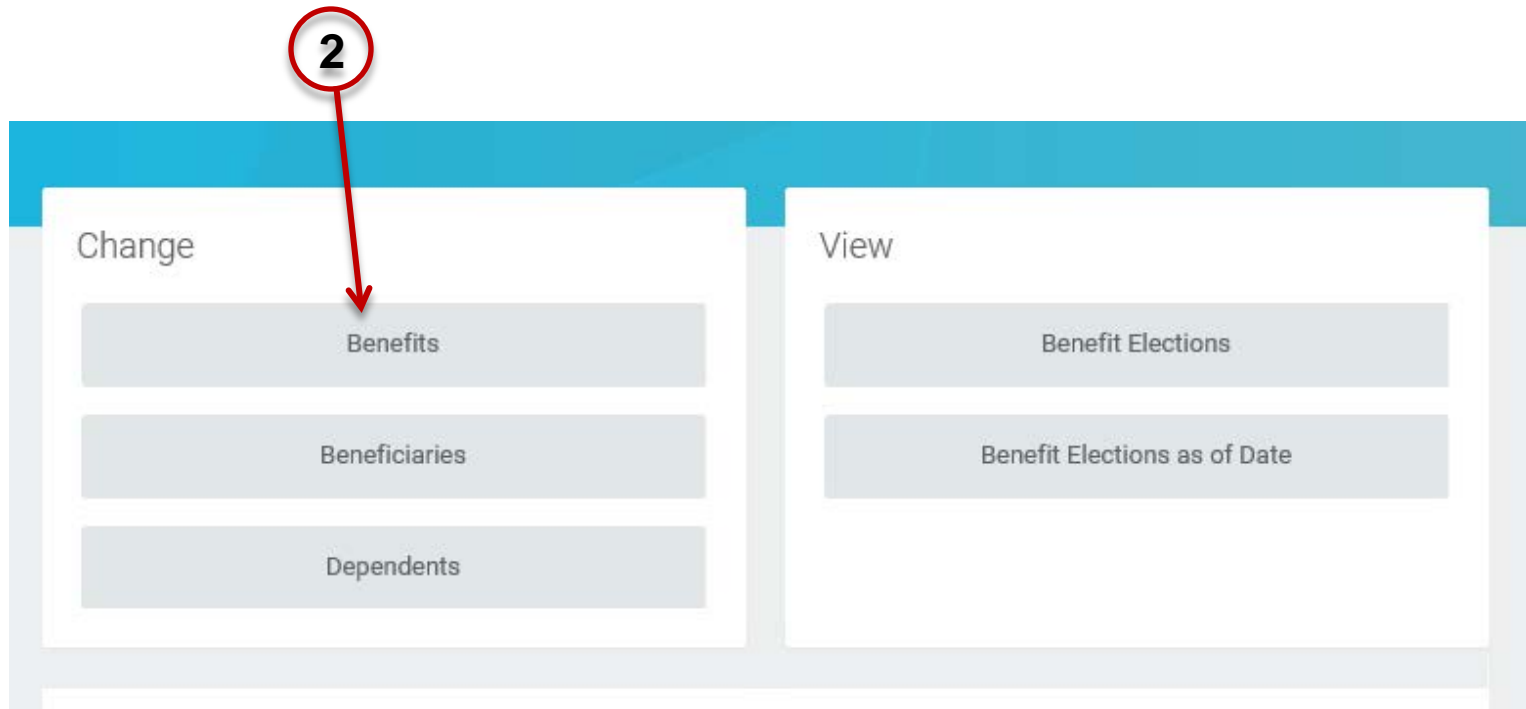
BENEFICIARY UPDATE- SELF SERVICE

How to Update Your Beneficiary in WorkDay

- Log into WorkDay; in the home screen, click on the “Benefits” icon.



- Click on the 'Benefits' option in the Change Menu



- Select the “Beneficiary Update” option from the list of Benefit Event Types

Benefit Event Type *

- Beneficiary Update
- Birth/Adoption
- Dependent Addition (not Birth or Adoption)
- Dependent Drop
- Update - FSA DCAP

Benefit Event Date *

08 / 11 / 2017

Submit Elections By 08/17/2017

- Enter today's date

- Click on “Submit” at the bottom of the page

- In the next screen, click on the “Open” option

The screenshot shows a mobile application interface for "Change Benefit Elections". At the top, there is a title "Change Benefit Elections" and a grey "Open" button. Below this is a form with a question: "Have you used tobacco in any form in the past 12 months?". There are two radio button options: "Yes" (unselected) and "No" (selected). Below the form is a section titled "Insurance Plan Dependencies and Coverage Lim" with a right-pointing arrow. Underneath is a section titled "Insurance Elections 8 items" which contains a table with two rows of insurance plans. At the bottom of the screen, there are four buttons: "Continue" (green), "Save for Later" (white), "Cancel" (white), and "Elect" (grey).

Benefit Plan	*Election
Firm Life - Aetna (Partner) (Individual)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive
Firm Life - AIG (Partner) (Individual)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive

- A new screen will open, Click on “Continue” at the bottom of the page.

- Click “Continue” in the new screen

- In this screen you will be able to change your beneficiary elections, by clicking on the + sign next to the benefit.

Event Date 08/11/2017
Initiated On 08/11/2017
Submit Elections By 08/17/2017

Retirement Savings Elections 2 Items

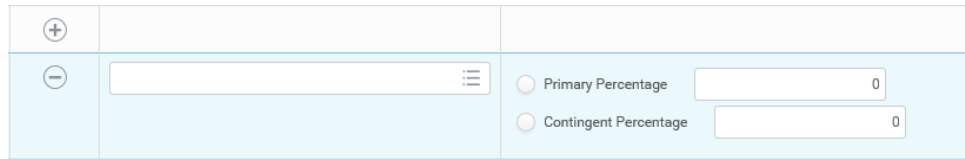
Benefit Plan	
	Defined Contribution (DC) - One America

Continue Save for Later Go Back Cancel

5

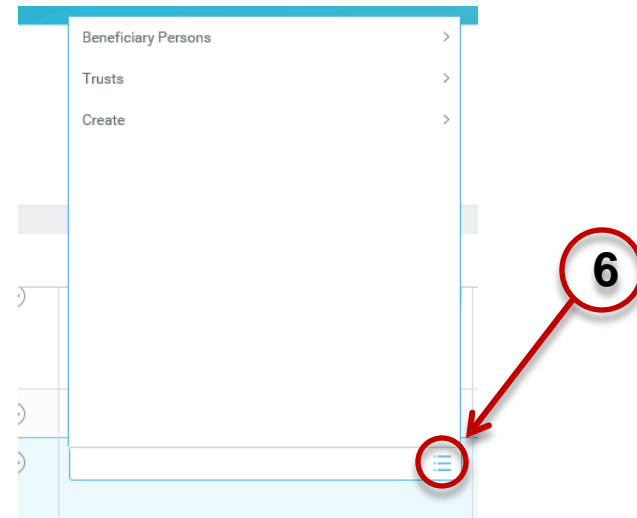
Other Beneficiaries - Paul Hastings (Individual) +

- After clicking on the “+” sign, a selection box will appear



A screenshot of a software interface showing a selection box. The box is divided into two sections. The top section contains a plus sign (+) and a minus sign (-). The bottom section contains a text input field with a menu icon (three horizontal lines) to its right. To the right of the input field, there are two radio button options: "Primary Percentage" and "Contingent Percentage", each followed by a text input field containing the number "0".

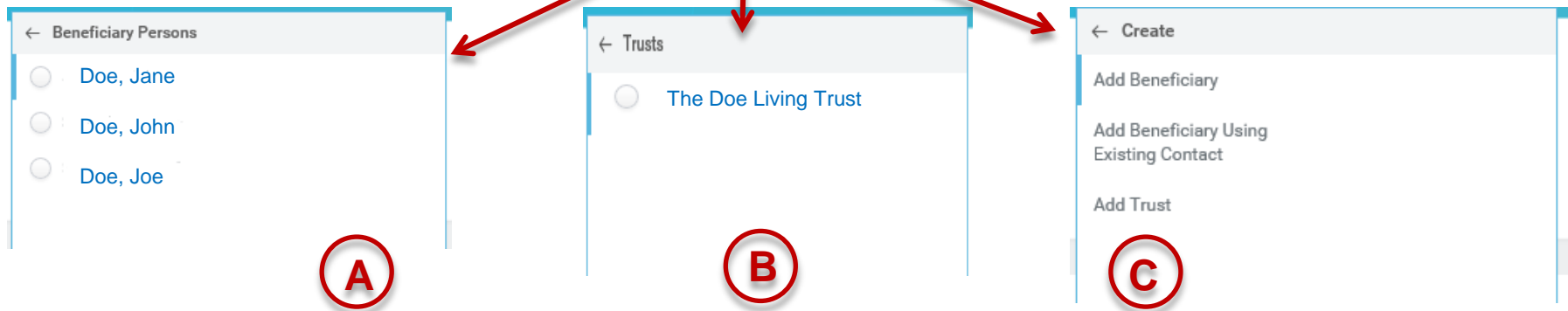
- Click on the menu to the right side of the selection box, to view your options.



- **Beneficiary Persons**
- make changes to existing beneficiaries

- **Trusts**
- make changes to existing trusts

- **Create**
- create new beneficiaries/ trusts



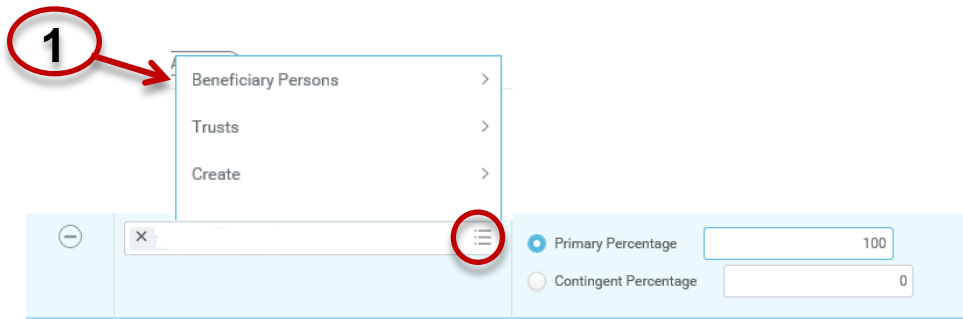
Each of these options will be reviewed in the next slides

7A- BENEFICIARY PERSONS

1. You can select an existing beneficiary to assign to your benefit.

2. Select the beneficiary you wish to appoint.

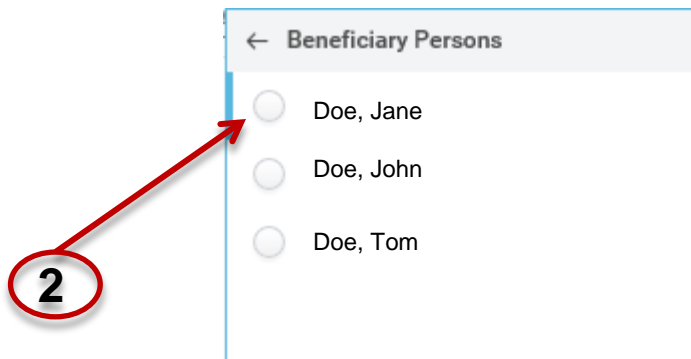
3. Designate your percentage amounts for your beneficiaries.



1

Beneficiary Persons >
Trusts >
Create >

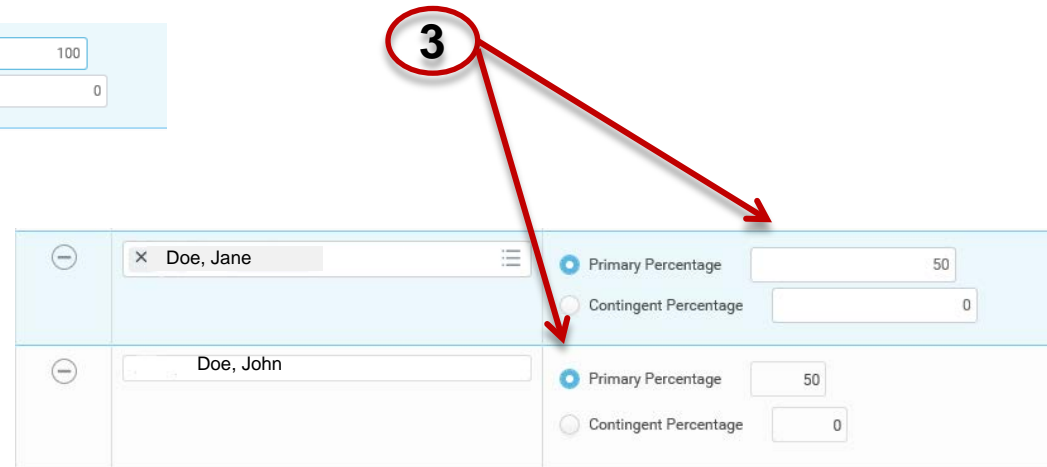
Primary Percentage
Contingent Percentage



2

← Beneficiary Persons

Doe, Jane
 Doe, John
 Doe, Tom



3

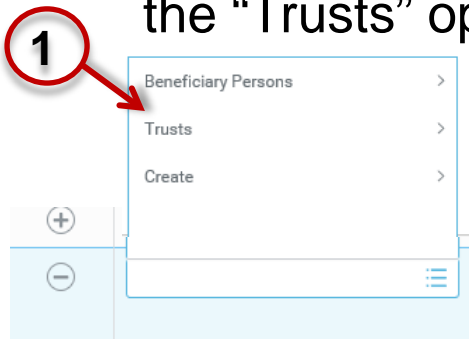
× Doe, Jane

Primary Percentage
Contingent Percentage

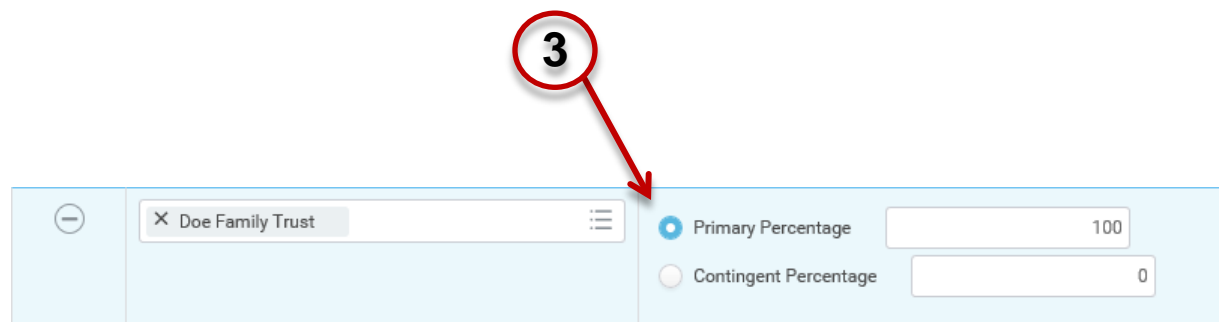
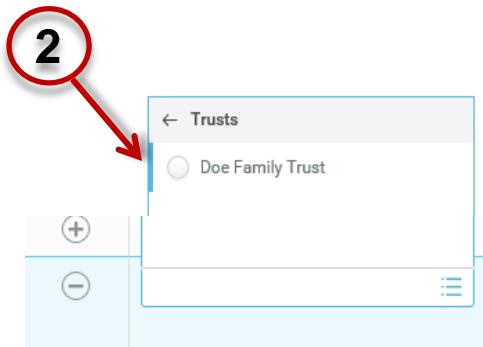
× Doe, John

Primary Percentage
Contingent Percentage

1. Assign existing trusts to benefit plans by clicking on the “Trusts” option

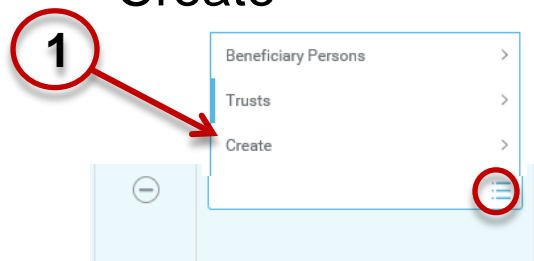


2. Select the available existing trust you would like to designate.
3. Assign Primary or Contingent percentages to a trust in lieu of a person.

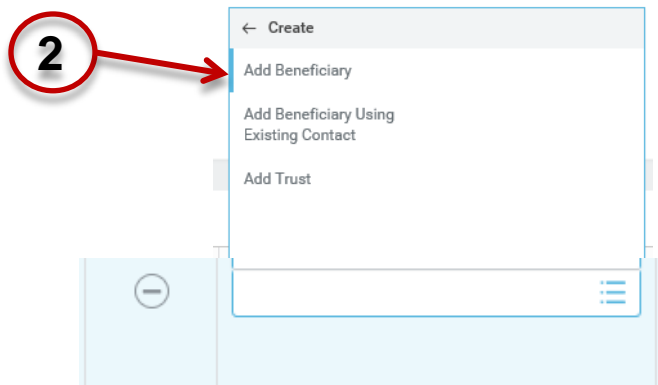


7C- CREATE A NEW BENEFICIARY OR TRUST

1. To Create a new beneficiary, click on the menu in the beneficiary box and select “Create”



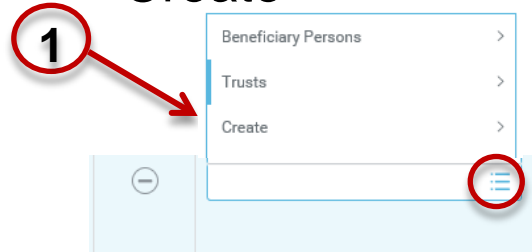
2. Click on the “Add Beneficiary” option.
3. Fill in the required information and click “Ok”

A form with the following fields: 'Relationship' (required, dropdown), 'Use as Beneficiary' (checkbox, checked), 'Date of Birth' (MM/DD/YYYY, date picker), 'Age' (empty, dropdown), 'Gender' (select one, dropdown), 'Full-time Student' (checkbox, unchecked), 'Student Status Start Date' (empty), 'Student Status End Date' (empty), 'Disabled' (checkbox, unchecked), and 'Allow Duplicate Name' (checkbox, unchecked).A form with the following fields: 'Country' (required, dropdown, 'United States of America'), 'Prefix' (dropdown), 'First Name' (required, text input), 'Middle Name' (text input), 'Last Name' (required, text input), and 'Suffix' (dropdown). A red circle with the number '3' is around the 'Country' field, and a red arrow points to it.

Fill out the mandatory fields (relationship, name, contact) It is best to provide as much information as possible including phone number, birth date, and social security number.

7C- CREATE A NEW BENEFICIARY OR TRUST

1. To create a new trust, click on the menu in the beneficiary box and select “Create”



2. Click on the “Add Trust” option.

3. Fill in the required information and click “Ok”.

Trust Name *

Trust ID

Trust Date

Trustee Contact Information

Trustee Name

Country *

Prefix

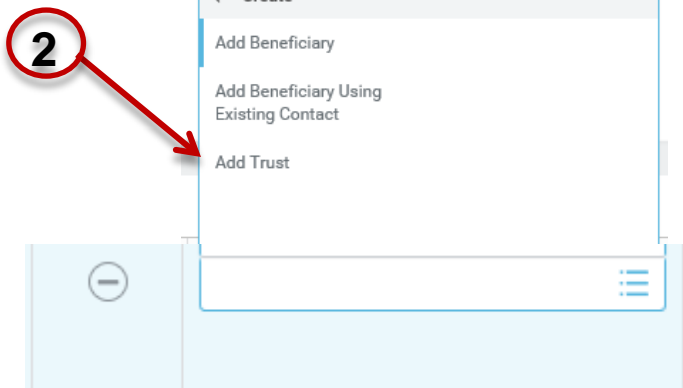
First Name *

Middle Name

Last Name *

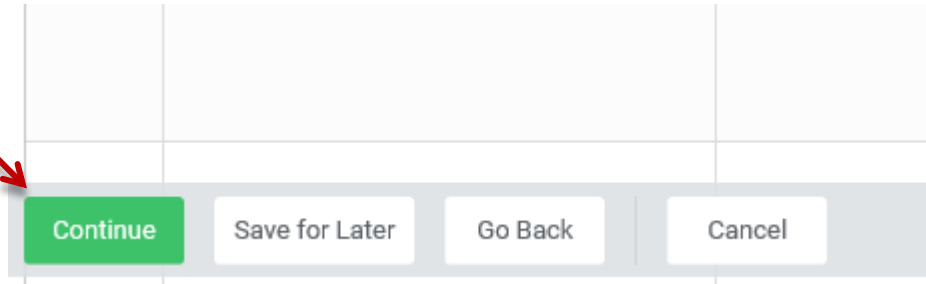
Suffix

Fill out the mandatory fields (Trust name, Trustee name) It is best to provide as much information as possible including phone number and address.



- Once you've made your selections for beneficiaries click the "Continue" icon at the bottom of the page

8



- Scroll down the next screen and electronically sign off on the changes you've made by clicking on the "I Agree" box

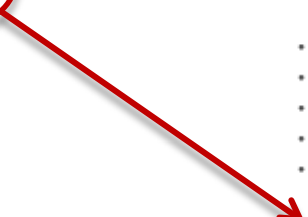
Electronic Signature

Legal Notice: Please Read

By signing into to this site with your user name and password, making,

- You are signing this election form electronically, with the same
- You acknowledge that the Firm periodically adjusts what it char
- You authorize the Firm to deduct from your earnings what the F
- You acknowledge that the charges for benefits shown on this fc
- those amounts, such other amounts as you may elect from time
- You also authorize the Firm to deduct from your earnings the ar
- You acknowledge that some of your benefits may be taxable, e.
- You acknowledge that you may not change your benefit electior
- You confirm that the information in this form is correct.
- You certify that you understand and approve the elections you l

9



I Agree

- Click on the “Submit” icon at the bottom of the page, then click on “Done” in the next screen

