

**Fiduciary Preference**  
Pension and Fiduciary Service  
March 2021

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**Objectives**

- Identify fiduciary order of preference
- Document fiduciary preference in the Field Exam Report

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**References**

- 38 CFR 13.100(e)(1), *Order of preference in appointing a fiduciary*
- FPM I.2.C.5.b, *Beneficiary's Fiduciary Preference*

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 PBA SERVICE

### Order of Preference

- Beneficiary's preference
- Spouse
- Relative who has care/custody
- Other relative of beneficiary
- Friend, acquaintance, other
- Chief officer of institution

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 PBA SERVICE

### Order of Preference (Continued)

- Bonded officer of Indian reservation
- Court appointed fiduciary
- Paid federal fiduciary
- Temporary fiduciary

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 PBA SERVICE

### Preferred Fiduciary Information

- Preferred fiduciary?
- Follow up questions (if applicable)
  - Beneficiary able to state fiduciary preference?
  - Name of preferred fiduciary?
  - Preferred fiduciary appointed?
  - If no, select reason for non-selection
- Add Fiduciary Preference



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### Questions?



- Order of Preference
- Preferred Fiduciary Information

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### TMS Survey

- A satisfaction survey has been assigned to you in TMS.
- You should be able to complete the survey within ten minutes.
- Be sure to complete the survey in TMS to receive credit for this training.

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