

Your Total Rewards

U.S. Benefits Beneficiary Guide

Benefit Plan	Beneficiary Instructions	Contact
Savings Plan	<p>Log into My HR Tools and click on the Vanguard tile. In your Vanguard account, select “Menu” from the upper left corner of the home page, then click on “My Profile” and select “Beneficiaries.” Designate your primary and contingent beneficiaries as appropriate.</p> <p><i>* If you also have a non-retirement account with Vanguard, you will need to select “Log on” from the pop-up window and select “Employer Plans” before advancing to the “Menu.”</i></p>	Vanguard 800-523-1188
Deferred Compensation Programs	<p>Log into My HR Tools and click on the Vanguard tile. Under your account balance, select “View Balance Details.” Select your nonqualified plan to be redirected, next select “My Plans” tab from the top menu, then “Beneficiaries.” Click “Edit” to add or update your primary and contingent beneficiaries as appropriate.</p> <p><i>* If you also have a non-retirement account with Vanguard, you will need to select “Log on” from the pop-up window and select “Employer Plans” before advancing to the “Menu.”</i></p>	Vanguard 800-523-1188
Pension Key Employee Supplemental Retirement Plan	<p>Log into My HR Tools and click on the UPoint tile.</p> <p>In UPoint, click the down arrow next to the “Your Profile” tab at the top right-hand corner of the page and select “Manage Beneficiaries.” Depending on your benefit selection, you will see one to six tabs. Beginning with the first tab, select “Add Beneficiary” or “Manage Beneficiaries” and follow the steps as prompted.</p>	Benefits Center 800-965-4421
Basic Life Insurance Supplemental Life Insurance Accidental Death & Dismemberment (AD&D) Occupational Accidental Death (OAD) Spouse Life Insurance* Child Life Insurance* Spouse AD&D* Child AD&D*	<p>Log into My HR Tools and click on the UPoint tile.</p> <p>In UPoint, click the down arrow next to the “Your Profile” tab at the top right-hand corner of the page and select “Manage Beneficiaries” and follow the steps as prompted.</p> <p><i>* As the employee, you are the designated beneficiary for Life Insurance and/or AD&D insurance for your spouse and/or child, if insurance is elected.</i></p>	Benefits Center 800-965-4421



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Health Savings Account (HSA)	<p>Log into the member website at Bank of America and go to the “Accounts” tab. Select “Profile Summary”, then “Add Beneficiary.”</p>	<p>Bank of America 877-785-6698</p>
Restricted Stock Units (RSU)	<p>Log into My HR Tools and click on the Bank of America Merrill Lynch tile.</p> <p>On the Merrill Lynch website, select the Phillips 66 Equity Program link on the My Accounts page. From the Grant Summary-Grant Detail page, select the Beneficiary tab and follow the prompts.</p> <p>This beneficiary designation is applicable for all outstanding awards remaining in the Phillips 66 plans. Any equity in your personal brokerage account will need to have a separate designation. Contact Merrill Lynch to designate a beneficiary(ies) for your personal brokerage account as well.</p>	<p>Merrill Lynch 877-785-6698</p> <p>Outside the US or Canada dial direct: 609-537-0600</p>

Note: Be prepared with your beneficiary’s date of birth, Social Security Number, address and telephone number. For certain plans, if you designate as your primary beneficiary someone who is not your spouse, you may be required to complete and submit an additional form or obtain your spouse’s notarized consent.



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