

# COMPLETING YOUR ENROLLMENT FORM

## THE ALLIANCE 403(B) RETIREMENT PLAN

Thank you for enrolling in the Alliance Retirement Plan!



Please complete the attached enrollment form and give it to your employer. They will send it to Alliance Benefits with any other required documents. Please do not send this form directly to Empower Retirement.

### TIPS FOR COMPLETING YOUR FORM

1. In the Payroll Information section, select either the Before Tax or Roth (after-tax) option. Please discuss your choice with your employer so they can withhold and report your contributions correctly.
2. Write in the desired percentage or flat dollar amount you would like withheld from your pay period.
  - You should not include the employer's contributions to this form.
  - Your gross pay, including housing allowance, will be used to calculate the contribution percentage.
3. Leave blank the Payroll and Division Center name and number. Alliance Benefits will fill this in for you.
4. Choose your investment options on page 1-2. Leaving this blank will enroll you in the default option for your age range, a TIAA-CREF Lifecycle Target Date Fund. This fund is a managed portfolio designed to grow more conservative as retirement approaches.
5. If you would like professional advice on your investment options, please call our consultants, Strategic Financial Partners. Leave a message at (866) 963-1843, and your call will be returned as soon as possible, generally within two business days. There is no additional charge to you for this service.
6. If you are married and name your spouse as Primary Beneficiary 100% on page 2, you may leave blank the Spousal Consent on page 3.
7. Sign as the Participant on page 4. Alliance Benefits will sign as the Plan Administrator.
8. Keep a copy of this form for your records. Review your paystub and Empower Retirement account regularly; ask your employer or Alliance Benefits if you have questions about the amounts.
9. When you have a pay increase, please check with your employer to be sure they report your new 403(b) contribution amounts to Alliance Benefits.

We appreciate your time in completing this form. If you have further questions, feel free to contact us here at Alliance Benefits. We are happy to help.



**Participant Enrollment  
403(b) Plan**

**The Christian and Missionary Alliance Retirement Plan**

**95803-01**

**Participant Information**

_____	_____	_____
Last Name	First Name	MI
<i>(The name provided MUST match the name on file with Service Provider.)</i>		

\_\_\_\_\_ Social Security Number

\_\_\_\_\_ Mailing Address

\_\_\_\_\_ E-Mail Address

_____	_____	_____
City	State	Zip Code

Married  Unmarried  Female  Male

( )	( )
Home Phone	Work Phone

Mo	Day	Year	Mo	Day	Year
Date of Birth			Date of Hire		

Check box if you prefer to receive quarterly account statements in Spanish.

Do you have a retirement savings account with a previous employer or an IRA?  Yes  No

Would you like help consolidating your other retirement accounts into your account with Empower Retirement?\*  Yes, I would like a representative to call me at phone # \_\_\_\_\_ to review my options and assist me with the process. The best time to call is \_\_\_\_\_ to \_\_\_\_\_ A.M./P.M. (circle one - available 6 a.m. to 8 p.m. Mountain time). \*Rollovers are subject to your Plan's provisions.

**Payroll Information**

- I elect to contribute \$ \_\_\_\_\_ or \_\_\_\_\_% (do not complete both) (up to \$19,500.00 or 1% - 100%) per pay period of my compensation as Before Tax contributions to the 403(b) Plan until such time as I revoke or amend my election.
- I elect to contribute \$ \_\_\_\_\_ or \_\_\_\_\_% (do not complete both) (up to \$19,500.00 or 1% - 100%) per pay period of my compensation as Roth contributions to the 403(b) Plan until such time as I revoke or amend my election.
- I elect to make a voluntary after-tax contribution of \$ \_\_\_\_\_ or \_\_\_\_\_% (do not complete both) per pay period of my compensation to the 403(b) Plan until such time as I revoke or amend my election.

Payroll Effective Date: \_\_\_\_\_  
Mo Day Year

\_\_\_\_\_ Payroll Center Name

\_\_\_\_\_ Payroll Center Number

\_\_\_\_\_ Division Name

\_\_\_\_\_ Division Number

**Investment Option Information (applies to all contributions) - Please refer to your communication materials for information regarding each investment option.**

I understand that funds may impose redemption fees on certain transfers, redemptions or exchanges if assets are held less than the period stated in the fund's prospectus or other disclosure documents. I will refer to the fund's prospectus and/or disclosure documents for more information.

INVESTMENT OPTION			
NAME	TICKER CODE	%	
Alliance Development Fund.....	N/A	CMAADF	_____
Columbia Dividend Income Adv.....	CVIRX	CVIRX	_____
PGIM High-Yield R6.....	PHYQX	PHYQX	_____
PGIM Total Return Bond Z.....	PDBZX	PDBZX	_____
Templeton Global Bond R6.....	FBNRX	FBNRX	_____
American Century Growth R6.....	AGRDX	AGRDX	_____

INVESTMENT OPTION			
NAME	TICKER CODE	%	
American Funds EuroPacific Gr R6.....	REGX	REGX	_____
Invesco Oppenheimer Developing Mrkts R6....	ODVIX	ODVIX	_____
TIAA-CREF Lifecycle Index Ret Inc Inst.....	TRILX	TRILX	_____
TIAA-CREF Lifecycle Index 2010 Instl.....	TLTIX	TLTIX	_____
TIAA-CREF Lifecycle Index 2015 Instl.....	TLFIX	TLFIX	_____
TIAA-CREF Lifecycle Index 2020 Instl.....	TLWIX	TLWIX	_____

\_\_\_\_\_  
Last Name

\_\_\_\_\_  
First Name

\_\_\_\_\_  
M.I.

\_\_\_\_\_  
Social Security Number

**INVESTMENT OPTION**

NAME	TICKER CODE	%
Steward Large Cap Enhanced Index Instl.....	SEECX	SEECX
Vanguard Institutional Index I.....	VINIX	VINIX
Vanguard Mid Cap Index Ins.....	VMCIX	VMCIX
Columbia Small Cap Value II Instl 2.....	CRRRX	CRRRX
Principal SmallCap Growth I Instl.....	PGRTX	PGRTX
Steward Small-Mid Cap Enhanced Idx Instl.....	SCECX	SCECX
Cohen & Steers Instl Realty Shares.....	CSRIX	CSRIX
Vanguard Materials Index Adm.....	VMIAX	VMIAX

**INVESTMENT OPTION**

NAME	TICKER CODE	%
TIAA-CREF Lifecycle Index 2025 Instl.....	TLQIX	TLQIX
TIAA-CREF Lifecycle Index 2030 Instl.....	TLHIX	TLHIX
TIAA-CREF Lifecycle Index 2035 Instl.....	TLYIX	TLYIX
TIAA-CREF Lifecycle Index 2040 Instl.....	TLZIX	TLZIX
TIAA-CREF Lifecycle Index 2045 Instl.....	TLXIX	TLXIX
TIAA-CREF Lifecycle Index 2050 Instl.....	TLLIX	TLLIX
TIAA-CREF Lifecycle Index 2055 Instl.....	TTHIX	TTHIX
TIAA-CREF Lifecycle Index 2060 Instl.....	TVIIX	TVIIX

**MUST INDICATE WHOLE PERCENTAGES = 100%**

**Plan Beneficiary Designation**

This designation is effective upon execution and delivery to Service Provider at the address below. If I name more than one beneficiary in either category, the surviving beneficiaries in that category will share equally unless otherwise indicated. I have the right to change the beneficiary. If any information is missing, additional information may be required prior to recording my beneficiary designation. If my primary and contingent beneficiaries predecease me or I fail to designate beneficiaries, amounts will be paid pursuant to the terms of the Plan Document or applicable law.

**This designation supersedes all prior designations. Beneficiaries will share equally if percentages are not provided and any amounts unpaid upon death will be divided equally. Primary and contingent beneficiaries must separately total 100.00%. The number of primary or contingent beneficiaries you may name is not limited. Attach an additional sheet, if necessary.**

**Primary Beneficiary**

#1 .

_____	_____	_____	_____
% of Account Balance	Social Security Number	Primary Beneficiary Name	Date of Birth
( )	Relationship (Required - If Relationship is not provided, request will be rejected and sent back for clarification.)		
_____	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Grandchild <input type="checkbox"/> Sibling <input type="checkbox"/> My Estate <input type="checkbox"/> A Trust <input type="checkbox"/> Other		
Phone Number (Optional)			

#2 .

_____	_____	_____	_____
% of Account Balance	Social Security Number	Primary Beneficiary Name	Date of Birth
( )	Relationship (Required - If Relationship is not provided, request will be rejected and sent back for clarification.)		
_____	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Grandchild <input type="checkbox"/> Sibling <input type="checkbox"/> My Estate <input type="checkbox"/> A Trust <input type="checkbox"/> Other		
Phone Number (Optional)			

**Contingent Beneficiary**

#1 .

_____	_____	_____	_____
% of Account Balance	Social Security Number	Contingent Beneficiary Name	Date of Birth
( )	Relationship (Required - If Relationship is not provided, request will be rejected and sent back for clarification.)		
_____	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Grandchild <input type="checkbox"/> Sibling <input type="checkbox"/> My Estate <input type="checkbox"/> A Trust <input type="checkbox"/> Other		
Phone Number (Optional)			

#2 .

_____	_____	_____	_____
% of Account Balance	Social Security Number	Contingent Beneficiary Name	Date of Birth
( )	Relationship (Required - If Relationship is not provided, request will be rejected and sent back for clarification.)		
_____	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Parent <input type="checkbox"/> Grandchild <input type="checkbox"/> Sibling <input type="checkbox"/> My Estate <input type="checkbox"/> A Trust <input type="checkbox"/> Other		
Phone Number (Optional)			



\_\_\_\_\_  
Last Name\_\_\_\_\_  
First Name\_\_\_\_\_  
M.I.\_\_\_\_\_  
Social Security Number\_\_\_\_\_  
Number

System or access the Web site in order to transfer monies from the default investment option. Also, I understand all contributions received after an account is established on my behalf will be applied to the investment options I have most recently selected.

**Account Corrections** - I understand that it is my obligation to review all confirmations and quarterly statements for discrepancies or errors. Corrections will be made only for errors which I communicate within 90 calendar days of the last calendar quarter. After this 90 days, account information shall be deemed accurate and acceptable to me. If I notify Service Provider of an error after this 90 days, the correction will only be processed from the date of notification forward and not on a retroactive basis.

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## Signature(s) and Consent

### Participant Consent

I have completed, understand and agree to all pages of this Participant Enrollment form. I understand that Service Provider is required to comply with the regulations and requirements of the Office of Foreign Assets Control, Department of the Treasury ("OFAC"). As a result, Service Provider cannot conduct business with persons in a blocked country or any person designated by OFAC as a specially designated national or blocked person. For more information, please access the OFAC Web site at:

<http://www.treasury.gov/about/organizational-structure/offices/Pages/Office-of-Foreign-Assets-Control.aspx>.

**Important Notice:** If you are married and the Plan is subject to spousal consent requirements under ERISA and/or the Plan Document, you must have your spouse's signature notarized to designate a primary beneficiary other than your spouse or in addition to your spouse.

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### Participant Signature

\_\_\_\_\_  
Date

*A handwritten signature is required on this form. An electronic signature will not be accepted and will result in a significant delay.*

**Participant** forward to Plan Administrator

### Authorized Plan Administrator Approval

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### Authorized Plan Administrator Signature

\_\_\_\_\_  
Date

*A handwritten signature is required on this form. An electronic signature will not be accepted and will result in a significant delay.*

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### Print Full Name

**Plan Administrator** forward to Service Provider at:

Empower Retirement

PO Box 173764

Denver, CO 80217-3764

**Express Address:**

8515 E. Orchard Road, Greenwood Village, CO 80111

**Phone #:** 1-866-467-7756

We will not accept hand delivered forms at Express Mail addresses.

**Securities offered by GWFS Equities, Inc., Member FINRA/SIPC, marketed under the Empower brand, and/or other broker-dealers.** GWFS is affiliated with Great-West Funds, Inc.; Great-West Trust Company, LLC; and registered investment advisers Advised Assets Group, LLC and Great-West Capital Management, LLC, marketed under the Great-West Investments™ brand.