



SAVE TOGETHER

THE ALLIANCE 403(B) RETIREMENT PLAN

GUIDE TO FILLING OUT 403(B) RETIREMENT FORMS

FOR A CHURCH TO BEGIN 403(B) PARTICIPATION:

- Adoption Agreement
- Bank Authorization Form with copy of voided check
- Monthly Contribution Report
- 403(b) Enrollment Form for each participating employee

FOR A PARTICIPATING CHURCH TO ENROLL A NEW EMPLOYEE:

- Monthly Contribution Report
- 403(b) Enrollment Form for new employee

CHANGING CONTRIBUTIONS:

- Monthly Contribution Report—needed for any change
- Paycheck Contribution Election Form—if the employee is changing the percentage or flat dollar amount of their contribution
- Adoption Agreement—if the church is changing its contribution policy to a new percentage

BANK CHANGE:

- Bank Authorization Form with a copy of voided check

ADDRESS CHANGE:

- Please email retirement@cmalliance.org with your old and new address

INVESTMENT OPTIONS CHANGE:

- Call Empower Retirement at 866-467-7756

OTHER FORMS:

- For beneficiary designations, personal information changes, or withdrawals, please contact Alliance Benefits at 800-700-2651 or Empower Retirement at 866-467-7756 to obtain the right form for your situation

