CHRISTIAN BROTHERS SERVICES
Understanding Protecting Guiding

403(b) Retirement Savings Plan

Plan # 093264

ENROLLMENT FORM

Step 1: Account Information

Social Security # ___ ___ ___ Location Code ___

Name (Last, First, MI) ___

Home Address ___

___

City ___ State ___ Zip ___

Date of Birth (mm/dd/yyyy) ___ M/F ___

Date of Hire (mm/dd/yyyy) ___ Plan Entry Date (mm/dd/yyyy) ___

Step 2. Payroll Directions

I authorize my employer to deduct the following amount from my compensation each pay period and contribute that amount to my savings plan account.

% Deferral _____ (indicate from 1% to 100%) OR _____ (dollar amount)

☐ I do not wish to participate in the Christian Brothers Retirement Savings Plan.

☐ I wish to suspend my contributions to the Plan.

General Information

Investments:

- Your money will automatically be invested in the Vanguard Target Date fund nearest your 65th birthday.
- If you are age 65 or older at the time of enrollment, your money will be invested in the Vanguard Target Income Fund.
- If you wish to choose your own investments, you will need to register* with Vanguard online at vanguard.com (or call Vanguard at 800-523-1188) and change the investment election. Your plan number is 093264.

Step 3. Acceptance

Please sign and give the form to your Employer.

Signature of Participant Date

To be Completed by Employer

If you have administrator web access, please log in and enter new participant. Otherwise, please sign the form and send to Christian Brothers Retirement Planning Services. If emailing, please use our secure message center at cbservices.org.

Signature of Employer Date Phone