

ENROLLMENT FORM

INSTRUCTIONS

1. Complete enrollment form.
2. Complete the salary reduction agreement (if you are making employee elective contributions).
3. Complete the bank draft authorization (if you or your employer wants your contributions deduction from bank account).
4. Mail, email, or fax the completed forms.

PERSONAL INFORMATION (Please Print)

FOR OFFICE USE ONLY

Date Received _____

Account # _____

U.S. Citizen: Yes No Are you?: Ordained Missionary

Marital Status: Married Single/Widow(er)/Divorced Separated

Name: _____ Date of Birth: _____

Address: _____ City: _____ State: _____ Zip: _____

Phone: _____ Home Cell Work: _____

Soc. Sec. No.: _____ Sex: M F E-mail Address: _____

EMPLOYER

Employer's Name: _____ Position: _____

City: _____ State: _____ Zip: _____

Church Treasurer/Payroll Administrator Name: _____ Email: _____

BENEFICIARIES

Primary Beneficiary

I designate the following as my primary beneficiary(ies): (Must be spouse if married unless waiver filed):

Name: _____ Date of Birth: _____

Address: _____ City: _____ State: _____ Zip: _____

(If address is same as applicant, write "same")

Social Security Number: _____ Relationship: _____ Percentage: _____

Name: _____ Date of Birth: _____

Address: _____ City: _____ State: _____ Zip: _____

(If address is same as applicant, write "same")

Social Security Number: _____ Relationship: _____ Percentage: _____

Contingent Beneficiary

I designate the following as my contingent beneficiary(ies). (In the event the primary beneficiary is deceased, the contingent beneficiary(ies) will receive the funds in the account).

Name: _____ Date of Birth: _____

Address: _____ City: _____ State: _____ Zip: _____

(If address is same as applicant, write "same")

Social Security Number: _____ Relationship: _____ Percentage: _____

Name: _____ Date of Birth: _____

Address: _____ City: _____ State: _____ Zip: _____

(If address is same as applicant, write "same")

Social Security Number: _____ Relationship: _____ Percentage: _____

Name: _____ Date of Birth: _____

Address: _____ City: _____ State: _____ Zip: _____

(If address is same as applicant, write "same")

Social Security Number: _____ Relationship: _____ Percentage: _____

(For additional beneficiaries, please attach a paper with full name, address, social security number and relationship)

CONTINUED ON BACK

ENROLLMENT FORM

TERM LIFE INSURANCE

Group term life insurance is available through Guardian Insurance Company for enrollees who are under 65 years of age. The Basic Term Life Coverage is \$25,000 (for as long as you are employed by a FWB employer). The monthly premium of \$16.50 is deducted from the contributions to your retirement account. For more information regarding this Group Term Life Insurance, please go to our website at www.richlandavefinancial.com/retirement/life-insurance/.

- Yes, I want this Group Term Life Insurance coverage. Please fill out the online retirement plan life insurance enrollment form.
- No, I do not want this Group Term Life Insurance coverage.

INVESTMENT SELECTION

You may invest in one or all investment options. Please indicate the percentage that you want invested in each option (must total 100%). If no choice is made, all funds will remain in the Default strategy.

Investment Options (See Prospectus for description of Strategies)	Contribution Percentage
The Set Rate Fund	_____ %
The Moderate Strategy	_____ %
The Default Strategy	_____ %
The Maximum Strategy	_____ %
All Cap Growth Equity	_____ %
Large Cap Growth	_____ %
Large Cap Value	_____ %
SMID Cap	_____ %
Real Estate (REITs)	_____ %
Intermediate Fixed Income	_____ %
Short-Term Fixed Income	_____ %
Total	_____ %

CERTIFICATION

I am a salaried employee of an eligible employer for at least 20 hours per week. I request that Richland Ave Financial invest my accumulations/contributions based upon my investment choices above. I have reviewed the information provided by Richland Ave Financial and I make this selection based upon my own investment judgment. I realize that past results are not a guarantee of future performance. If I need additional information, I know that I can contact Richland Ave Financial.

Signature: _____ Date: _____

The retirement account provided by Richland Ave Financial is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency.