Vanguard Section 403(b) Custodial Account - Non-Erisa

FOR USE ON OR AFTER JULY 10, 2017

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% in whole %'s or ________ fixed whole 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.
  *Note: please wait until you have received confirmation of your enrollment in the mail from Vanguard before registering.

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