

The Episcopal Church Lay Employees Defined Contribution Retirement Plan Employee Application for Membership Instructions

Please complete the attached Employee Application and return it to your employer. Completing this form accurately helps to ensure that funds will be properly allocated to your retirement account. By signing this document, you agree to allow The Church Pension Fund, Fidelity, any other vendor with whom you have a 403(b) account and your employer to share information with respect to your account in order to ensure proper administration of the Plan in accordance with applicable laws.

After your application has been processed, you will receive "Your Guide to Getting Started" and a Beneficiary form. Should your personal information change, please notify the Church Pension Fund as soon as possible. A Participant Change Form can be downloaded from the CPG website at www.cpg.org.

Employee Application for Membership Line-by-Line Instructions

Section I

Employer name: Full name of your employer.
Employer address: Full address of your employer, including ZIP code.

Section II

Employee name: Your full name.
Social Security number: Your Social Security number must be provided in order to have your application processed. Your Social Security number will be used as your account identification number.
Employee address: Your full mailing address, including ZIP code.
Phone numbers: Your business and home telephone numbers, including area code.
E-mail address: Your e-mail address.
Annual compensation: Your annual base salary, excluding bonuses, incentives, and overtime pay.
Hire Date: The date you began working for your employer.
Birth date: Your date of birth.
Sex: Male or female.
Marital status: Married or Not Married.

Section III

Employee contribution: Once you receive your enrollment guide in the mail, you will need to log on to www.cpg.org/myaccount and enter the amount you would like deducted from your pay; use whole dollars or percentages. Contributions will commence once you, the participant, have satisfied the Employer eligibility criteria.

Section IV

Investment options: To help you meet your investment goals, the Plan offers you a range of investment options. In order to complete the "Employee Portion" of your enrollment, you will need to log on to www.cpg.org to select these investment options. Complete your enrollment using whole percentages only. Your total allocation must equal 100%. If your investment percentages do not equal 100% or your allocation is incomplete, the remaining contributions will be defaulted to a target retirement date Fidelity Freedom Fund which assumes your retirement age will be age 65. All nonvested employer dollars will also default to one of the target retirement date Fidelity Freedom Funds.®

Section V To be completed by the employee:

Employee's signature and date: Your signature and the date you signed the application.

Section VI To be completed by your employer:

To be completed by your employer: Please review the information included on this application before signing. You are responsible for verifying the accuracy of the information. Employer's Authorized Signature, Title, and Date.
Employee Effective Date: The first day of the month following the 90th day of employment or the period of time as specified in the Employer Adoption Agreement.
Mail to: The Church Pension Fund
Pension Services
445 Fifth Avenue
New York, NY 10016
Please retain a copy for your records.

The Episcopal Church Lay Employees Defined Contribution Retirement Plan Employee Application for Membership

Section I—Employer information

Employer name: _____

Employer address: _____

City

State

Zip

Section II—Employee information (all information must be provided)

Employee name: _____

Social Security number: _____

Employee address: _____

City

State

Zip

Phone numbers: **Business:** _____ **Home:** _____

E-mail address: _____

Annual compensation: _____

Hire/Ordination date: _____

Birth date: _____

Sex: Female
 Male

Marital status: Married
 Not Married

Section III—Employee contribution

Once you receive your enrollment guide in the mail, you will need to log on to www.cpg.org/myaccount and enter the amount to be deducted from your pay; use whole dollars or percentages. Contributions will commence the first day of the month following receipt of the enrollment form.

Section IV—Investment Options

To help meet your investment goals, the Plan offers you a range of investment options. In order to complete the “Employee Portion” of your enrollment, you will need to log on to www.cpg.org to select these investment options. Complete your enrollment using whole percentages only. Your total allocation must equal 100%. If your investment percentages do not equal 100% or your allocation is incomplete, the remaining contributions will be defaulted to a target retirement date appropriate Fidelity Freedom Fund which assumes your retirement age will be age 65. All nonvested employer dollars will also default to one of the target retirement date Fidelity Freedom Funds.®

Section V—Instructions to the employee

This is a legal document; make all entries thoughtfully and clearly. Please be certain your Social Security number is correct, because all contributions are maintained using this number. Be certain birth dates are correct; any error may delay your benefits. Complete the enclosed beneficiary designation form carefully to ensure that, upon your death, your account will be distributed in accordance with your wishes.

By signing this form you permit The Church Pension Fund, Fidelity, any other vendor with whom you have a 403(b) account, and your employer to share information regarding your account to ensure compliance with all applicable laws.

Employee's signature

Date

Section VI—To be completed by the employer:

Employer, please examine the entries on this application before signing it to be sure it is complete and correct. By signing this form, you are verifying its accuracy.

Employer's authorized signature/Title

Date

Employee Effective Date: _____

Mail to: The Church Pension Fund
Pension Services
445 Fifth Avenue
New York, NY 10016

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