

## Employee Enrollment Form Defined Contribution (RSVP and Lay DC) Plans

### Section 1: Employee Information and Marital Status

All information must be provided. Indicate where not applicable with N/A.

#### Legal Name

First  MI  Last

#### Mailing Address

Street

City  State  ZIP  Country

Home Phone  Mobile Phone

Email

Social Security # / ITIN  Date of Birth<sup>1</sup>

Gender<sup>2</sup>  Male  Female Marital Status  Single  Married

#### Spouse's Legal Name

First  MI  Last

Gender<sup>2</sup>  Male  Female

Social Security # / ITIN  Date of Birth

Date of Marriage

### Section 2: Employment Information

All information must be provided. Indicate where not applicable with N/A.

#### Employer Name

#### Mailing/Billing Address

Street

City  State  ZIP

Employee's Title  Hire Date

Scheduled Hours of Work Per Year  Enrollment Effective Date<sup>3</sup>

### Section 3: Compensation

Other than a one-time payment, list all amounts on an **annual basis**. If you are paid on an hourly basis, consult with your employer to estimate your annual pay and have your employer report any compensation changes if and when they occur.

\$

**Base salary** (excluding housing) and scheduled taxable cash payments

\$

**One-time payment**

\$

**Cash housing allowance** and/or utilities

**Payment date**

**Employer-provided housing?**

Yes  No

(Check Yes if employer provides **physical housing** cost free to the employee)

<sup>1</sup> Please provide a copy of your driver's license, passport, or birth certificate as proof of your date of birth.

<sup>2</sup> This field is used by CPG's affiliates and third-party vendors to provide employee benefits to our clients. In general, we are only able to accept "M" or "F" for this field at this time. Please contact Client Services at 866-802-6333 if you have any questions about this field.

<sup>3</sup> Can only be on the first of a month and cannot be retroactive.

## Section 4: Employee Contribution

**Plan enrolling in:**     RSVP                                     Lay DC  
**This is a:**                     New Enrollment                     Transfer from previous employment

On the appropriate line below, enter the amount (in whole dollars or as a percentage) you would like deducted from your compensation on a **pre-tax basis\*** and contributed to the RSVP or Lay DC Plan.

\$ \_\_\_\_\_ per payroll period, OR  
\_\_\_\_\_ % of your compensation per payroll period

If you do **not** insert a dollar or percentage amount above, you will be deemed to have elected not to make contributions to the RSVP or Lay DC Plan and, therefore, will not be entitled to receive any matching contributions (if applicable) under the terms of the RSVP or Lay DC Plan and your employer's RSVP or Lay DC Plan Adoption Agreement. You may still be entitled to receive the base employer contribution (if applicable) under the terms of your employer's RSVP or Lay DC Plan Adoption Agreement even if you do not contribute.

\*After you are enrolled, Fidelity will send you an email with instructions on how to set up your Fidelity NetBenefits® account. Then sign in to NetBenefits to change your contribution type to also be on a Roth and/or after-tax basis. You can change the amount deducted from your compensation at any time by accessing your account online at NetBenefits or contacting Fidelity Investments at 877-208-0092.

## Section 5: Investment Options

To help you meet your investment goals, the RSVP and Lay DC Plan offer you a range of investment options. Upon enrollment, unless you make investment elections, your contributions will by default be invested in a target retirement date fund that assumes your retirement age will be age 65. In order to modify your investment elections, access your account at Fidelity NetBenefits.

- If Fidelity does not have a date of birth or has an invalid date of birth on file, your contributions may be invested in an income fund.

## Section 6: Employee Signature

This is a legal document; make all your selections 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, as any error may delay your benefits.

By signing this form you (1) permit The Church Pension Fund, Fidelity Investments, any other vendor with whom you have established a 403(b) account, and your employer to share information regarding your account to ensure compliance with all applicable laws; and (2) authorize your employer to withhold contributions from your compensation as indicated in Sections 3 and 4.

**Employee's Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

## Section 7: Employer Signature

Please review the entries on this application before signing to verify that all entries are complete and correct. By signing this form, you are verifying its accuracy.

**Employer's Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

Print Name \_\_\_\_\_ Title \_\_\_\_\_

Email \_\_\_\_\_

Submit the completed and signed form to:

**Online:** Go to [MyCPG Accounts](#), sign in, and click Document Upload in the Resources section

**Email:** [benefits@cpg.org](mailto:benefits@cpg.org)

**Mail:** The Church Pension Fund, 19 East 34th Street, New York, NY 10016

If you have any questions, call us at 866-802-6333, Monday to Friday, 8:30 AM to 8:00 PM ET.

*This material is provided for informational purposes only and should not be viewed as investment, tax, or other advice. It does not constitute a contract or an offer for any products or services. In the event of a conflict between this material and the official plan documents or insurance policies, any official plan documents or insurance policies will govern. The Church Pension Fund ("CPF") and its affiliates (collectively, "CPG") retain the right to amend, terminate, or modify the terms of any benefit plan and/or insurance policy described in this material at any time, for any reason, and, unless otherwise required by applicable law, without notice.*

## Instructions for Employee Enrollment Form Defined Contribution (RSVP and Lay DC) Plans

### Use this form to:

- Enroll in The Episcopal Church Retirement Savings Plan (RSVP) or The Episcopal Church Lay Employees' Defined Contribution Retirement Plan (Lay DC Plan).
- Your employer must have adopted the applicable plan before you can enroll.

### Who should complete the form:

- Clergy enrolling in the RSVP and lay employees enrolling in the Lay DC Plan or the RSVP. In general, you should be participating in the Clergy Pension Plan or Lay Defined Benefit Plan to enroll in the RSVP.

### Instructions

Please complete the attached Employee Enrollment Form 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 Investments, 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, Fidelity will email you an electronic copy of *Your Guide to Getting Started*. This guide contains additional information on the Lay DC Plan and RSVP. Should your personal information change, please report it through *MyCPG Accounts* when the change occurs. Your employer should report any changes in employment status through *MAP*.

#### Section 1: Employee Information and Marital Status

Complete the information completely. Missing information may delay your enrollment.

#### Section 2: Employment Information

Complete the information about your employment. (Your employer can assist you in completing this information.)

- Enrollment Effective Date: This is the effective date of your enrollment into the plan, usually the first of the month following employment or, if later, the first of the month after a completed Employee Enrollment Form is accepted by The Church Pension Fund. This date cannot be retroactive.

#### Section 3: Compensation

Your employer can assist you in completing this information. Please see *Your Guide to Getting Started* for more information on how compensation is defined—including the differing definitions used for the purpose of determining employer contributions versus employee contributions.

#### Section 4: Employee Contribution

Enter the amount you would like deducted from your compensation on a pre-tax basis and contributed to the RSVP or Lay DC Plan using whole dollar or percentage amounts. After you are enrolled, you can change your contribution type to also be on a Roth and/or after-tax basis at Fidelity NetBenefits. Please refer to *Your Guide to Getting Started* for more information on these contribution types.

#### Section 5: Investment Options

Review the information and go to Fidelity NetBenefits® at [cpg.org/myaccount](http://cpg.org/myaccount) to learn about your investment options and make your selections.

#### Sections 6 and 7: Employee's & Employer's Signature

Sign and date the application. Please review the entries on this application before signing to verify that all entries are complete and correct and that you understand how contributions will be made to the RSVP or Lay DC Plan. By signing this form, you are verifying its accuracy.

Submit the completed and signed form to:

**Online:** Go to [MyCPG Accounts](#), sign in, and click Document Upload in the Resources section

**Email:** [benefits@cpg.org](mailto:benefits@cpg.org)

**Mail:** The Church Pension Fund, 19 East 34th Street, New York, NY 10016

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*Neither CPF's defined contribution plans, nor any company or account maintained to manage or hold plan assets and interests in such plans or accounts, are subject to registration, regulation, or reporting under the Investment Company Act of 1940, the Securities Act of 1933, the Securities Exchange Act of 1934, the Employee Retirement Income Security Act of 1974, as amended ("ERISA"), or state securities laws. Plan participants and beneficiaries therefore will not be afforded the protections of the provisions of those laws. In addition, as church plans, CPF's defined contribution plans are not subject to ERISA.*