



SERVANT SOLUTIONS
 P.O. BOX 2559
 ANDERSON, IN 46018
 (765) 642-3880 (800) 844-8983
 FAX (765) 642-3942
servantsolutions.org

SSN

Membership Number

(Office Use Only)

BP

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RETIREMENT PLAN MEMBERSHIP APPLICATION FORM

MEMBER'S NAME _____ Male
 _____ Female
 (PRINT FIRST, MIDDLE, LAST)

TELEPHONE # Day _____ Evening _____

ADDRESS _____ EMAIL _____

CITY _____ STATE _____ ZIP CODE _____

DATE OF BIRTH ____/____/____ **SOCIAL SECURITY #** _____
 MO. DAY YR.

EMPLOYER (CHURCH / AGENCY / ORGANIZATION) _____

EMPLOYER'S ADDRESS _____ CITY _____

STATE _____ ZIP _____ EMPLOYER'S TELEPHONE _____

PRESENT POSITION _____ DATE EMPLOYED _____

DATE OF ORDINATION _____ Ordained by:

NOT ORDAINED LICENSED COMMISSIONED

Church of God

Other _____

US CITIZEN: YES NO

MARRIED SINGLE, WIDOW(ER), DIVORCED SEPARATED

DATE OF MARRIAGE ____/____/____
 MO. DAY YR.

SPOUSE'S NAME _____ MAIDEN NAME _____
 (PRINT FIRST, MIDDLE, LAST)

SPOUSE'S DATE OF BIRTH ____/____/____ SPOUSES' SOCIAL SECURITY # _____
 MO. DAY YR.

Please complete the Participant Investment Election Form on the reverse side.

If you have questions or need assistance, please contact Servant Solutions at (765) 642-3880 or (800) 844-8983.

PLEASE NOTE: If you do not elect any of the investment choices, your current Retirement Plan accumulations (if any) and all future Retirement Plan contributions will, by default, be invested in the LifeFund Age-Based Portfolio based on your date of birth.

INVESTMENT ELECTION

Option 1: **DO IT FOR ME** - LifeFund Age-Based Portfolio

I understand

- Contributions will be directed within the LifeFund Age-Based Portfolio based on my date of birth (or as defined by my employer if my age is not evident in the Basic Information section of my Membership Application).
- My investment election will be effective when my Membership Application and a contribution are processed by the Servant Solutions office.
- I may change my investment allocation among the investment fund options on any given day that the market is open within the restrictions established by the mutual fund managers and by Servant Solutions.

Option 2: **CUSTOMIZED CHOICES** - Select any combination of these options:

Servant Solutions Age-Based Portfolio Investment Options

- _____ % LifeFund Age-Based Portfolio: 1980+ (After 1979)
- _____ % LifeFund Age-Based Portfolio: 1975—1979
- _____ % LifeFund Age-Based Portfolio: 1970—1974
- _____ % LifeFund Age-Based Portfolio: 1965—1969
- _____ % LifeFund Age-Based Portfolio: 1960—1964
- _____ % LifeFund Age-Based Portfolio: 1955—1959
- _____ % LifeFund Age-Based Portfolio: 1950—1954
- _____ % LifeFund Age-Based Portfolio: 1945—1949
- _____ % LifeFund Age-Based Portfolio: Heritage (Before 1945)

Single Mutual/Single Fund Investment Options (These options are not listed in risk order)

- _____ % American Century Diversified Bond I Fund (Fixed Income: Intermediate-Term Bond) ACBPX
- _____ % American Funds Washington Mutual Investors R6 Fund (Equity: U.S. Large Cap Value) RWMGX
- _____ % DFA U.S. Targeted Value Portfolio Institutional Fund (Equity: U.S. Small Cap Value) DFFVX
- _____ % MFS International Intrinsic Value R3 Fund (Equity: International Equity) MINGX
- _____ % PIMCO CommoditiesPLUS Strategy Institutional Fund (Commodities) PCLIX
- _____ % Guidestone Equity Index Instl Fund (Equity: Socially Screened U.S. Large Cap Blend) GEQYX
- _____ % Guidestone Medium Duration Bond Instl Fund (Fixed Income: Socially Screened Bond) GMDYX
- _____ % GuideStone International Equity Index Instl Fund (Equity: Socially Screened International) GIYX
- _____ % T. Rowe Price Blue Chip Growth Fund (Equity: U.S. Large Cap Growth) TRBCX
- _____ % Vanguard Emerging Markets Stock Index Institutional Fund (Equity: Emerging Mkts) VEMIX
- _____ % Vanguard Explorer Admiral Fund (Equity: U.S. Small Cap Growth) VEXRX
- _____ % Vanguard Extended Market Index Institutional Fund (Equity: Mid Cap Blend) VIEIX
- _____ % Vanguard Institutional Index Institutional Fund (Equity: U.S. Large Cap Indexation) VINIX
- _____ % Vanguard Real Estate Index Admiral Fund (Real Estate Securities) VGSIX
- _____ % Vanguard Total Bond Market Index Instl Fund (Fixed Income: Intermediate Term Bond) VBTIX
- _____ % Vanguard Total International Stock Index Instl Fund (Equity: International Indexation) VTSNX
- _____ % Principal Fixed Income Guaranteed Option (Stable Value/Fixed Income—Not a Mutual Fund)
- 100** % TOTAL

See the attached investment composition chart. (The chart is also available on our website at servantsolutions.org.)

Allocation can be 100% for any one fund or in increments of 1% for more than one fund. Total of all selections must equal 100%

Check here if you want your account accumulations automatically rebalanced on a quarterly basis to your specified percentages **(not applicable if only one investment option is selected.)**

Investment options in the Servant Solutions Retirement Plan are not insured nor guaranteed by Servant Solutions, any bank, the Federal Deposit Insurance Corporation, or any other government agency. Investment in the funds involves investment risk, including the possible loss of the principal amounts invested. The funds have not been approved or disapproved by the Securities and Exchange Commission or any state regulatory authority.

I understand and acknowledge that my right to benefits from the Servant Solutions Retirement Plan (as amended and restated) shall be governed by the terms and conditions of the Plan Document and that said document is available at servantsolutions.org. A copy of the Plan Document will be mailed to me upon request.

I direct Servant Solutions to invest my current Retirement Plan accumulations (if any) and future Retirement Plan contributions (made by me or on my behalf) in the available investment options according to the percentages indicated above.

Signature _____ Date _____

NOTICE TO NEW PARTICIPANTS

You have become a participant in a 403(b) plan established and administered by Servant Solutions ("Plan").

The National Securities Markets Improvement Act (the "Act") signed into law on October 11, 1996, exempts church plans from federal and state securities laws, except for anti-fraud provisions. In order to qualify for the exemption, church plans must satisfy eligibility requirements under Code Sec. 414(e) and the assets of church plans must be used exclusively for the benefit of plan participants and beneficiaries. Church plans continue to be subject to the Internal Revenue Code and its regulations regarding eligibility, governance, and operations of such plans.

The Act requires the Plan to notify participants that the Plan is not subject to and the participants are not covered by state and federal securities laws. The following notice is provided in accordance with the Act:

The Plan or any company or account maintained to manage or hold assets of the Plan and interests in such Plan, companies, or accounts (including any funds maintained by Servant Solutions) is not subject to registration, regulation, or reporting under the Investment Company Act of 1940, the Securities Act of 1933, the Securities Exchange Act of 1934, Title 15 of the United States Code, or State securities laws. Therefore, the Plan participants and beneficiaries will not be afforded the protections of those provisions.

Investment Composition of the LifeFund Age-Based Portfolios

(as of April 1, 2022)

LifeFund Name (Birth Year)	Heritage (before 1945)	1945 1949	1950 1954	1955 1959	1960 1964	1965 1969	1970 1974	1975 1979	1980+ (after 1979)	
Time-Based Portfolio Allocations:										
Long-term	30%	40%	45%	50%	60%	70%	80%	87%	90%	
Intermediate-term	45%	40%	40%	40%	40%	30%	20%	13%	10%	
Short-term	25%	20%	15%	10%	0%	0%	0%	0%	0%	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Fund Allocations:										
Long-term	Vanguard Institutional Index Institutional	9.9%	13.2%	14.9%	16.5%	19.8%	23.1%	26.4%	28.7%	29.7%
	Vanguard Value Index Institutional	4.8%	6.4%	7.2%	8.0%	9.6%	11.2%	12.8%	13.9%	14.4%
	Vanguard Growth Index Institutional	3.0%	4.0%	4.5%	5.0%	6.0%	7.0%	8.0%	8.7%	9.0%
	Vanguard Total Intl Stock Index Institutional	6.9%	9.2%	10.3%	11.5%	13.8%	16.1%	18.4%	20.0%	20.7%
	Vanguard Emerging Mkts Stock Idx Instl	2.4%	3.2%	3.6%	4.0%	4.8%	5.6%	6.4%	7.0%	7.2%
	Vanguard Extended Market Index Instl	3.0%	4.0%	4.5%	5.0%	6.0%	7.0%	8.0%	8.7%	9.0%
Intermediate-term	Vanguard Total Bond Market Index Instl	11.2%	10.0%	10.0%	10.0%	10.0%	7.5%	5.0%	3.2%	2.5%
	Vanguard High-Yield Corporate Adm	2.3%	2.0%	2.0%	2.0%	2.0%	1.5%	1.0%	0.7%	0.5%
	Vanguard Intmtdt-Term Trs Idx Admiral	7.6%	6.8%	6.8%	6.8%	6.8%	5.1%	3.4%	2.2%	1.7%
	Vanguard Interm-Term Investment-Grde Adm	9.5%	8.4%	8.4%	8.4%	8.4%	6.3%	4.2%	2.7%	2.1%
	Vanguard Mortgage-Backed Secs Idx Adm	9.0%	8.0%	8.0%	8.0%	8.0%	6.0%	4.0%	2.6%	2.0%
	Vanguard Short-Term Trs Idx Admiral	2.2%	2.0%	2.0%	2.0%	2.0%	1.5%	1.0%	0.7%	0.5%
	Vanguard Shrt-Term Infl-Prot Sec Idx Adm	3.2%	2.8%	2.8%	2.8%	2.8%	2.1%	1.4%	0.9%	0.7%
Short-term	Vanguard Short-Term Bond Idx Instl	25.0%	20.0%	15.0%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		100%	100%	100%	100%	100%	100%	100%	100%	100%

The Servant Solutions custom age-based funds are each composed of mutual funds. Age-based funds for younger participants have greater stock market risk, while age-based funds for older participants have less exposure to stocks and a higher allocation to bonds and cash. Over time, each age-based fund reduces risk by following a glidepath, allocating more to bonds and cash and less to stocks. Age-based funds are automatically rebalanced at least quarterly. Rebalancing may occur more frequently if performance of individual funds or asset classes results in significant deviation from the age-based fund's target allocations.

DESIGNATION OF BENEFICIARY
FOR BENEFITS UNDER THE SERVANT SOLUTIONS RETIREMENT PLAN

SERVANT SOLUTIONS • PO BOX 2559 • ANDERSON, IN 46018

In certain situations, it is possible that you could die before receiving all of your benefits under the Servant Solutions Retirement Plan ("Plan"). For example, you could die before beginning to receive your Plan benefits or while you are receiving distributions in installments. Use this form to designate a beneficiary to receive any remaining Plan benefits following your death.

According to the Servant Solutions Retirement Plan Document, your spouse is your primary beneficiary. If you die and leave a surviving spouse, any remaining Plan benefits will automatically be paid to your spouse. **Therefore, you should not name your spouse as your contingent beneficiary.** If you die and do not leave a surviving spouse, any Plan benefits will be paid to the contingent beneficiary (or beneficiaries) designated on the second page of this form.

If you wish to name someone other than your spouse as your primary beneficiary, please contact Servant Solutions to obtain the necessary forms. Please note that the "Ten Years Certain Benefit" beneficiary designation (applicable only when electing an annuity payment in retirement), is filed on a separate form.

NAME AND ADDRESS OF MEMBER:

Name _____ Soc. Sec. No. _____

Street Address _____

City _____ State _____ Zip Code _____

Phone _____ Email _____

NAME OF PRIMARY BENEFICIARY (SPOUSE) _____

In the event of death or divorce and eventual re-marriage, the legal spouse at time of the member's death is the Primary Beneficiary, regardless of the name written above.

I do not want my spouse to be permitted to change my beneficiary designation if he or she survives me. [Note: If you check this box, no changes in this beneficiary designation can be made after your death.]

This form supersedes all other beneficiary designation forms previously filed, including any designation form previously filed with regard to the Death Benefits program and/or the, now grandfathered, Tax Deferred Supplement plan (TDS plan).

The second page of this form is REQUIRED; use it to designate your contingent beneficiary (or beneficiaries).

MEMBER'S SIGNATURE _____ DATED _____
(signature required on both pages of this form)

DESIGNATION OF BENEFICIARY
FOR BENEFITS UNDER THE SERVANT SOLUTIONS RETIREMENT PLAN

NAME OF MEMBER: _____

NAME AND ADDRESS OF CONTINGENT BENEFICIARY (OR BENEFICIARIES):

(If married, do not list your spouse in this section.)

Name _____ Soc. Sec. No. _____

Street Address _____

City _____ State _____ Zip Code _____

Relationship _____ Date of Birth _____

Phone _____ Email _____

Name _____ Soc. Sec. No. _____

Street Address _____

City _____ State _____ Zip Code _____

Relationship _____ Date of Birth _____

Phone _____ Email _____

Name _____ Soc. Sec. No. _____

Street Address _____

City _____ State _____ Zip Code _____

Relationship _____ Date of Birth _____

Phone _____ Email _____

Name _____ Soc. Sec. No. _____

Street Address _____

City _____ State _____ Zip Code _____

Relationship _____ Date of Birth _____

Phone _____ Email _____

Multiple beneficiary designations are paid on a *per capita* basis. If any one of the beneficiaries dies prior to distribution of any Plan benefits, his or her share will be divided equally among and paid to the surviving beneficiaries.

MEMBER'S SIGNATURE _____ DATED _____
(signature required on both pages of this form)