

APPLICATION FOR PARTICIPATION

FOR OFFICE USE ONLY

Date Received _____

Account # _____

PERSONAL INFORMATION *(Please Print)*

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

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

Name: _____ Date of Birth: _____

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

Telephone: Work _____ Home _____

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: *(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: _____

If unmarried and would like to designate an additional primary beneficiary(ies), please provide their information below and indicate the percentage for each primary beneficiary.

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

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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 have a retirement plan with the Board of Retirement). 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 see the included Life Benefit Summary or go to our website at www.boardofretirement.com.

- Yes, I want this Group Term Life Insurance coverage. Please fill out the Life Insurance application included in this packet.
- No, I do not want this Group Term Life Insurance coverage.

INVESTMENT OPTIONS

We offer flexible investment options to help you reach your retirement goals. You can find more information in our retirement prospectus or online at www.boardofretirement.com/investment-plan-options/. Please make your investment selections on the investment selection form.

CERTIFICATION

I am a salaried employee of a Free Will Baptist church or agency for at least 20 hours per week.

Signature: _____ Date: _____

REFERRAL

How did you hear about us? _____

The retirement account provided by the Board of Retirement & Insurance is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency.



FREE WILL BAPTIST BOARD OF RETIREMENT
P.O. Box 5002 • Antioch, TN 37011-5002 • 615.731.6812 • 877.767.7738
www.boardofretirement.com

INVESTMENT SELECTION

PERSONAL INFORMATION *(Please Print)*

Name: _____ Account #: _____

DIRECT ALLOCATION

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 Option.

Investment Options (See Prospectus for description)	Contribution Percentage
The Set Rate Fund*	_____ %
The Moderate Strategy*	_____ %
The Default Strategy*	_____ %
The Maximum Strategy*	_____ %
Large Cap Value	_____ %
Large Cap Growth	_____ %
All Cap Growth Equity	_____ %
Intermediate Fixed Income	_____ %
Short-Term Fixed Income	_____ %
Real Estate (REITs)	_____ %
<i>*Preset Plans</i>	
Total	_____ % Total Must Equal 100%

CERTIFICATION

I request that the Board of Retirement invest my accumulations/contributions based upon my investment choices above. I have reviewed the information provided by the Board of Retirement and I make this selection based upon my own investment judgment. I also realize that past results are not a guarantee of future performance. If I need additional information, I know that I can contact the Board of Retirement.

Signature: _____ Date: _____

The retirement account provided by the Board of Retirement & Insurance is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency.

* Current Funds - Current investments with the Board of Retirement.

** Future Contributions - New monies received in the office after this completed form is on file in the Retirement office.



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