

Enrollment Application

403(b)(9) Retirement Plan for Southern Baptist Churches



- Save time by calling **1-888-98-GUIDE** (1-888-984-8433) to enroll by phone, or enroll online at our Web site www.GuideStone.org.
- This form should be completed in ink. If you make any changes to the written information, please initial the changes.

PARTICIPANT INFORMATION

Participant first name: _____ MI: _____ Last: _____
Social Security number: _____ Birth date: ____/____/____
Gender: Male Female Marital status: Married Single Years in paid Southern Baptist service: _____
Current position: _____
Is position 20 hours per week or more: Yes No Hire date: ____/____/____
Daytime telephone: (____) _____ Email address: _____
Home address: _____
City: _____ State: _____ ZIP Code: _____
Spouse first name: _____ MI: _____ Last: _____
Spouse Social Security number: _____ Spouse birth date: ____/____/____

CONTRIBUTION INFORMATION

Monthly participant contributions Tax-sheltered \$ _____ Monthly employer contributions \$ _____
Roth elective deferral \$ _____
Tax-paid \$ _____

- I and/or my spouse have other retirement assets that we would like to consider rolling over to GuideStone.
 I would like to join the 1% Club and receive an annual reminder to increase my contribution in _____ (month).

EMPLOYER

Employer name: _____ Billing contact name: _____
Contact telephone number: (____) _____ Contact email address: _____
Billing address: _____
City: _____ State: _____ ZIP Code: _____

NEW EMPLOYER INFORMATION (TO BE COMPLETED BY EMPLOYER'S BILLING CONTACT)

Complete if this is the first employee from this employer to enroll in the 403(b)(9) Retirement Plan for Southern Baptist Churches.

Employer Tax I.D. number: _____ Association: _____



RETIREMENT CONTRIBUTION ASSISTANCE

Up to \$3,000 in additional retirement contributions may be available from GuideStone's *Mission/Church Assistance Fund*. If your church has an annual budget of \$75,000 or less, call GuideStone at **1-888-98-GUIDE** (1-888-984-8433) for details.

CHOOSE YOUR FUNDS

Please elect one of the options below. For fund information, see the *Fund Choices* booklet or visit www.GuideStoneRetirement.org/InvestmentChoices.

You have the right to make plan investment elections for contributions made on your behalf to the retirement plan. GuideStone has designated a Date Target Fund to which contributions are made if you do not select an option below. All contributions will be placed in this fund until you change your election and you have sole responsibility for this default election.

OPTION 1 – ONE CHOICE APPROACH / GUIDESTONE DATE TARGET FUNDS

Choose the appropriate MyDestination Fund® that most closely corresponds to the year in which you plan to retire. (Not applicable if you completed Option 2 or Option 3.)

- MyDestination 2005 MyDestination 2025 MyDestination 2045
- MyDestination 2015 MyDestination 2035 MyDestination 2055

OPTION 2 – ASSET ALLOCATION APPROACH / GUIDESTONE ASSET ALLOCATION FUNDS

Choose the (one) fund that best represents your investor profile. (Not applicable if you completed Option 1 or Option 3.)

- Conservative** – Conservative Allocation Fund **Moderately aggressive** – Growth Allocation Fund
- Moderately conservative** – Balanced Allocation Fund **Aggressive** – Aggressive Allocation Fund

OPTION 3 – BUILD YOUR OWN APPROACH / GUIDESTONE SELECT FUNDS

Use this option if you choose to mix your own portfolio from the **Select Funds**. (Not applicable if you completed Option 1 or Option 2.)

Investment Fund: _____ Percentage: _____ %

Investment Fund: _____ Percentage: _____ %

Investment Fund: _____ Percentage: _____ %

Total must equal 100% _____ %

Please write in the space below for more than three fund choices.

Return a copy of your completed form to: Retirement Operations
GuideStone Financial Resources, SBC
2401 Cedar Springs Road
Dallas, TX 75201-1498

Or you may fax your form to: (214) 720-2105

Detach and submit the bottom portion to your Employer to make participant contributions.

SALARY REDUCTION AGREEMENT

Monthly participant contributions Tax-sheltered \$ _____ Effective date: ____/____/____

Roth elective deferral \$ _____

Tax-paid \$ _____

I understand the amount of such reduction will be withheld from my paychecks and paid by my employer into my account in the 403(b)(9) Retirement Plan for Southern Baptist Churches through GuideStone. I further understand that written notice must be given before the effective date of any modifications. This election will remain in effect until I revoke it in writing or until I complete a new *Salary Reduction Agreement*.

Participant signature: _____ Date: ____/____/____

Once tax-sheltered and/or Roth elective deferral contributions in a calendar year reach the Code Section 402(g) limit, subsequent tax-sheltered and Roth deferral contributions will be treated as contributions under Code Section 414(v), to the extent the requirements for that section are met.

The IRS requires this Salary Reduction Agreement to be on file prior to any salary reduced contributions. The monthly participant contributions section above must match the contribution information portion of this form.