ICMA-RC is now

Missi☼nSquare
RETIREMENT

Standard Enrollment Form

- This form CANNOT be used to open an IRA account and instead go to www.icmarc.org/iraenroll.
- The document is to be used to provide requested information to your employer for entry into their internal HR and Payroll systems.
- This document is for general use for enrolling in employer sponsored retirement plans. This form cannot be used for RHS plans.

1 PERSONAL INFORMATION

EMPLOYER PLAN NUMBER:	EMPLOYER PLAN NAME:

SOCIAL SECURITY NUMBER: *FOR TAX REPORTING PURPOSES*   DATE OF BIRTH: *MM/DD/YYYY*   DATE EMPLOYED/REHIRED: *MM/DD/YYYY*   REHIRED? ☐ CHECK IF YES

FULL NAME: *LAST, FIRST, MI*   GENDER: ☐ Female ☐ Male   MARITAL STATUS: ☐ Married ☐ Single

MAILING ADDRESS:

STREET   *CITY*   *STATE*   *ZIP*

PREFERRED PHONE NUMBER: EMAIL ADDRESS:

2 ELECTIVE DEFERRALS

Specify your elective deferral(s) per pay period. Not all deferral types are available for every plan. Check with your employer to confirm what is available to you. For plans with mandatory contributions this section is not required. Contributions will begin as soon as administratively feasible under your employer's payroll policies.

Pre-tax contributions of _____% **OR** $_____ from my pay each pay period.

After-Tax contributions of _____% **OR** $_____ from my pay each pay period.

Roth contributions of _____% **OR** $_____ from my pay each pay period.

If you are taking advantage of the catch-up contribution provision available to
457 deferred compensation plan participants, please check the applicable box here: ☐ "Age 50" catch-up provision

3 INVESTMENT SELECTION

By submitting this form, you understand you have not chosen an investment option. To select an investment option, log into https://accountaccess.icmarc.org/login.jsp and select View Account from the down-down box next to your plan of choice and then click the Managed Funds option at the top of the page. If you do not select an investment option, you entire account will be invested in the Plan's default investment selection.

4 BENEFICIARY DESIGNATIONS

Once your account has been established, log in to your account at https://accountaccess.icmarc.org/login.jsp and select Beneficiaries from the drop-down box next to the plan of your choice in order to setup your beneficiary designations.

5 SIGNATURES *(SIGN, DATE, AND SUBMIT THE COMPLETED FORM TO YOUR EMPLOYER)*

Employee Signature: _____   Date: *MM/DD/YYYY* _____

Authorized Employer Official's Signature: _____   Date: *MM/DD/YYYY* _____

Authorized Employer Official's Name and Title: _____

Employee ID *(For Employer Use Only)*: _____

SUBMIT THE COMPLETED FORM TO YOUR EMPLOYER. RETAIN A COPY FOR YOUR RECORDS.

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