CHRISTIAN BROTHERS SERVICES

CHRISTIAN BROTHERS RETIREMENT SAVINGS PLAN

403(b) ENROLLMENT FORM – PLAN #83339

Step 1: Account Information

Social Security # ☐☐☐ ☐☐ ☐☐☐☐ Location Code ☐☐☐☐☐☐

Name (Last, First, MI) ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Home Address ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

City ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐ State ☐☐ Zip ☐☐☐☐☐ — ☐☐☐☐

Date of Birth (mm/dd/yyyy) ☐☐ ☐☐ ☐☐☐☐ M/F ☐

Date of Hire (mm/dd/yyyy) ☐☐ ☐☐ ☐☐☐☐ Plan Entry Date (mm/dd/yyyy) ☐☐ ☐☐ ☐☐☐☐

Step 2. Payroll Directions

I authorize my employer to deduct the following amount from my compensation each pay period and contribute that amount to my savings plan account.

☐ % Deferral _____ (indicate from 1% to 100%) or _____ (dollar amount)

☐ I do not wish to participate in the Christian Brothers Retirement Savings Plan.

☐ I wish to suspend my contributions to the Plan.

General Information

After your plan entry date, be sure to register online with Fidelity at www.netbenefits.com or call Fidelity at 800-343-0860 if you need assistance. During registration, you will need to provide certain demographic data.

Investments:

- Your money will automatically be invested in the Fidelity Freedom Index Fund Institutional Premium Class nearest your 65th birthday.
- If you are age 65 or older at the time of enrollment, your money will be invested in the Fidelity Freedom Index Income Fund Institutional Premium Class.
- Once you are registered, you can log in and change your investment election at any time.

Step 3. Acceptance

Please sign and give the form to your Employer.

Signature of Participant Date

To be Completed by Employer

If you have administrator web access, please log in and enroll the new participant online. Otherwise, please sign the form and send to Christian Brothers Retirement Planning Services. If emailing, please use our secure message center at cbservices.org.

Signature of Employer Date Phone