



ASSEMBLIES OF GOD US MISSIONS 2012 MBA 403(B) CONTRIBUTION ELECTION

General Information

Please use full legal name

First Name (Please use full legal name) Middle Name Last Name

Mailing Address

Social Security Number Date of Birth

Email Address Daytime Phone

Spouse First Name (Please use full legal name) Middle Name Last Name

Spouse Social Security Number Spouse Date of Birth

403(b) Contribution Election

Initial ONLY ONE of the three options

I wish to have the following contributions for my retirement:

_____ **OPTION 1:** ONLY the standard contribution of \$510/month (single) or \$600/month (married) to be deposited to Employer Contributions.

_____ **OPTION 2:** The standard contribution of \$510/month (single) or \$600/month (married) to be deposited as Employer Contribution, and I also wish to contribute to my pre-tax Compensation Reduction. The reduction of my personal allowance should be \$ _____ per month or year.

_____ **OPTION 3:** The standard contribution of \$510/month (single) or \$600/month (married) to be deposited as Employer Contribution, and I also wish to contribute to my Roth After-Tax Compensation Deduction. The reduction of my personal allowance should be \$ _____ per month or year.

(You can defer up to 100% of Includible Compensation or \$17,000; whichever is less. A catch-up provision for those who are 50 years and older allows an additional \$5,500 to the above amount. Includible Compensation equals gross pay less housing allowance and Rabbi Trust contributions. Additional limit increases may apply; contact MBA for more information)

Deferred Compensation Plan – “Rabbi” Trust 409A Compliant: Initial if applicable to you

_____ I wish to contribute more than the maximum and would like MBA to send me the forms required for the Deferred Compensation Plan – “Rabbi” Trust.

Investment Election

All received monies are invested three times a week and the most recent election instructions on file will be followed. If no selection is indicated, you will default to the MBA Income Fund. Certain strategies listed are an “all or nothing” investment option. You can elect various percentages in some investment options on the right with (no less than 10% in one category, with increases of 5%). Contact Customer Care Services a (800) 622-7526 if you have additional questions. I wish my investment strategy to be set up as follows:

If not a new enrollee:

I wish to change: ALL Contributions (both future contributions and my current existing balance) **OR**
 Future Contributions Only **OR** Existing Balance Only

Track 1— MBA FIXED INCOME FUND: The MBA Income Fund pays a fixed rate that is declared quarterly with interest compounding monthly. It has had an attractive stable rate of return since inception over 50 years ago. Your investment in this fund is used to build AG churches and ministry facilities across the country. By selecting this option you will be invested 100% in the MBA Fixed Income Fund.

Track 2— INDIVIDUAL INVESTMENT OPTIONS: This option allows you to blend the MBA Income Fund with a stock strategy. Please indicate the allocation for each investment directly below.

MBA Fixed Income Fund (100% Fixed)		_____ %
Steward Diversified Equity Strategy (100% Stocks)		_____ %
Steward Global Equity Income Fund		_____ %
Total Allocation		_____ 100%

Track 3—TARGET-DATE STRATEGIES: Target-date investment choices allow you to choose a strategy based on your date of retirement. The Steward Navigator funds help take the emotion out of investing to provide a disciplined approach toward your retirement goals. These strategies automatically adjust to become more conservative as your targeted date of retirement approaches.

- Steward Navigator 2010 Strategy
- Steward Navigator 2020 Strategy
- Steward Navigator 2030 Strategy
- Steward Navigator 2040 Strategy
- Steward Navigator 2050 Strategy

Track 4—RISK-BASED STRATEGIES: These pre-mixed strategies, based on levels of risk tolerance, create a well-diversified portfolio with one investment choice. The Steward strategies offer a fully-screened enhanced index investment approach. The Russell strategies offer a non-screened active manager investment approach.

- Steward Conservative Strategy (20% Stocks/80% Bonds)
- Steward Moderate Strategy (40% Stocks/60% Bonds)
- Steward Balanced Strategy (60% Stocks/40% Bonds)
- Steward Aggressive Growth Strategy (80% Stocks/20% Bonds)
- Steward Diversified Equity Strategy (100% Stocks)
- Russell Life Points® Balanced Strategy (60% Stocks/40% Bonds)
- Russell Life Points® Growth Strategy (80% Stocks/20% Bonds)
- Russell Life Points® Diversified Equity Strategy (100% Stocks)

Designation of Beneficiary

The following individual(s) shall be your beneficiary(ies). The benefit will be paid to your primary or contingent beneficiary(ies) upon your death and in equal shares to each unless otherwise indicated. If any primary beneficiary predeceases you, the contingent beneficiary(ies) shall acquire the designated share of your 403(b) account. If your primary beneficiary is an individual (as opposed to a trust), a contingent beneficiary should be designated. **If you list a trust as your beneficiary, you agree to provide a copy of the trust document and all future amendments in a timely fashion.** If you are married and your spouse is not your primary beneficiary, spousal signature is required. *See the Signature section on the next page.*

Beneficiary One

Select One: Primary Contingent Share: _____%

Name

Social Security Number

Address

Date of Birth

City State Zip

Relationship

Beneficiary Two

Select One: Primary Contingent Share: _____%

Name

Social Security Number

Address

Date of Birth

City State Zip

Relationship

Beneficiary Three

Select One: Primary Contingent Share: _____%

Name

Social Security Number

Address

Date of Birth

City State Zip

Relationship

Please check one:

- If a beneficiary of mine is listed as a primary beneficiary or contingent beneficiary and fails to survive me, his or her share shall go to my other contingent beneficiaries in equal shares.
- If a beneficiary of mine is listed as a primary beneficiary or contingent beneficiary and fails to survive me, his or her share shall go to his or her other issue (their grandchildren) by right of representation.

If this beneficiary section is not completed, the MBA 403(b) Plan's default beneficiaries will be in effect.

Signatures

By signing below, I hereby certify to the following:

The payor may rely fully on this designation, and I agree to promptly notify the payor if there is any change in the status of any primary or contingent beneficiary. I understand that if I fail to provide adequate identifying information for my beneficiaries and the payor is unable to locate them after due diligence, my account will be paid according to the MBA 403(b) plan document. I understand that IRS and MBA Plan rules restrict when amounts contributed to a 403(b) plan may be distributed.

Signature of Member

Printed Name of Member Date

Spouse (Only required if spouse is not the primary beneficiary.)

Please read the certification below before signing.

I hereby certify that I am the spouse of applicant and understand that I am not the primary beneficiary of this 403(b) account. I further certify that I am signing this certification of my own free will and am under no influence or duress by my spouse or any other person.

Signature of Spouse

Printed Name of Spouse Date

Employer

Please read the certification below before signing.

I verify this employee is eligible to participate based on our written plan document. Note employee may not sign as employer.

Signature of Employer

Printed Name of Employer Date