Initial Contribution Remittance Form for the 403(b)(9) Retirement Savings Plan of the Presbyterian Church (U.S.A.)*

Church/Organization Name

Street Address City State Zip

PIN: Plan Number: 5 7 8 8 7

Return to: ***Fidelity Investments,® P.O. Box 770002, Cincinnati, OH 45277-0090***

Participant Information

Social Security Number:	First/Last Name:	Employee Pretax Amount	Employee Roth Amount	Employer Pretax Amount
- -				
- -				
- -				
- -				
	Source Total:			

Enter Total Contribution Amount: $ ☐ **Check Enclosed**

Please:

- Make checks payable to **Fidelity Investments.**
- Include the plan number **57887** on your check.
- Include all new participant(s) Enrollment Applications with this remittance.
- **Do not** send the Salary Deferral Agreement (Form ORS-001) to Fidelity. Retain it in your files.

For further information regarding this invoice, call the Fidelity Treasurer Assistance line at **1-800-917-4369,** Monday through Friday, from 8:00 A.M. to midnight ET.

For information regarding the 403(b)(9) Retirement Savings Plan, please call the Retirement Savings Plan Team at the Board of Pensions at 800-773-7752 (800-PRESPLAN).

Remittance Prepared by: X

Daytime Phone: - -

Contribution Year: (Investments will be recorded as current year contributions unless otherwise indicated.)

***After this initial contribution remittance, Fidelity will send future invoices to your attention at the church.**

See other side of form for important information

Instructions for the Initial Contribution Remittance Form for the 403(b)(9) Retirement Savings Plan of the Presbyterian Church (U.S.A.)*

Complete the 403(b)(9) Plan Initial Contribution Remittance Form as follows:

1. Be sure to include the church name, address, and PIN # on the form. Next, add the new enrollee's Social Security number, name and contribution amount.
2. Verify that an Enrollment Form is included with the Initial Contribution Remittance Form for each new enrollee.
3. Verify that the contribution amounts listed on the Initial Contribution Remittance Form match the contributions you are actually sending for each employee.
4. Please make checks payable to: Fidelity Investments.
5. Send the completed Initial Contribution Remittance Form, check and Fidelity Investments Enrollment Form to:

Fidelity Investments
P. O. Box 770002
Cincinnati, OH 45277-0090

6. Please note that Fidelity will send future invoices to your attention at the employing organization, the following week after they have received the last contribution. It may be helpful for you and the enrollee(s) to establish a remittance schedule. Typically, such schedules can be monthly.
7. Should you experience a delay in receiving an invoice, call Fidelity Investments Treasurer Assistance Line immediately at **1-800-917-4369** to request another invoice.