Fidelity Investments® Enrollment Form for the 403(b)(9) Retirement Savings Plan of the Presbyterian Church (U.S.A.)

Enrollment form revised August 2021.
Please discard old photocopies, as they do not reflect current fund options.

Instructions to join the 403(b)(9) Retirement Savings Plan: Use this form if you wish to open an account and make contributions to the 403(b)(9) Retirement Savings Plan of the Presbyterian Church (U.S.A.). Completion of this form will instruct Fidelity to invest your contributions in the investment options available under the Plan.

Please complete this form and have your church treasurer or business administrator sign and mail the completed Enrollment Form to: Fidelity Investments, P.O. Box 770002, Cincinnati, OH 45277-0090 (or fax to 877-330-2476). **DO NOT send this form to the Board of Pensions; doing so will delay your enrollment into the Plan and your form will be returned to you.**

Transfer from an Existing Plan: If you are transferring assets to Fidelity as part of establishing a new account, please call Fidelity to request a transfer form.

Rollover Contribution: If you are making a rollover contribution to your Fidelity 403(b)(9) account from another 403(b) or 401(k) plan or an existing tax-sheltered annuity, please call Fidelity to request a rollover form.

Fees: Your account will be subject to a quarterly plan administration fee in the amount of $3.75. This fee will automatically be deducted from your account.

Questions? Call Fidelity at **800-343-0860 (mention plan #57887).**

1. YOUR INFORMATION

Please use a **black** pen and print clearly in **CAPITAL LETTERS.**

Social Security #: ___-__-____ Date of Birth: __-__-____

Date of Hire: __-__-____

Gender: Male: ☐ Female: ☐

Marital Status: Single: ☐ Married: ☐ Divorced: ☐ Widowed: ☐ Qualified Domestic Partner: ☐

First Name: M.I.:

Last Name:

Mailing Address:

City: State:

ZIP: _____-____

Daytime Phone: ___-___-____ Evening Phone: ___-___-____

Email Address:

2. YOUR EMPLOYMENT INFORMATION

Name of Participating Employer/Church:

Mailing Address of Participating Employer/Church:

City: State: ZIP: _____-____

Presbyterian Church PIN: Minister of the Word and Sacrament or Lay employee:

025100001

3. SELECTION OF INVESTMENT OPTIONS

Please enter the percentage of contributions you wish allocated to the investment options available under the Plan. The allocation must total 100%. Call Fidelity to obtain prospectus information for the Fidelity funds listed below.

Enter your choice of investment options to indicate how you would like all future contributions to your Plan account(s) to be invested.

Contribution elections will apply to all future contributions to your RSP account, including pretax and Roth after-tax contributions. If you wish to redirect your investments at any time, log onto Fidelity NetBenefits® at www.netbenefits.com/atwork or call 800-343-0860 (mention plan #57887).

Investment Options	Please use whole percentages	Investment Options	Please use whole percentages
Separate Accounts			
PC(USA) Socially Responsible Balanced Fund ☐ Pretax ☐ Roth	Percentage ___ %	PC(USA) Socially Responsible U.S. Equity Fund ☐ Pretax ☐ Roth	Percentage ___ %
Mutual Funds			
Fidelity® Diversified International Fund-Class K ☐ Pretax ☐ Roth	Percentage ___ %	Fidelity® 500 Index Fund ☐ Pretax ☐ Roth	Percentage ___ %
Fidelity® Growth Company Fund-Class K ☐ Pretax ☐ Roth	Percentage ___ %	Fidelity® Extended Market Index Fund ☐ Pretax ☐ Roth	Percentage ___ %
Fidelity® Investments Money Market Government Portfolio-Institutional Class ☐ Pretax ☐ Roth	Percentage ___ %	Fidelity® U.S. Bond Index Fund ☐ Pretax ☐ Roth	Percentage ___ %
Fidelity® Real Estate Investment Portfolio ☐ Pretax ☐ Roth	Percentage ___ %	Pax Global Environmental Markets Fund Institutional Class ☐ Pretax ☐ Roth	Percentage ___ %
T. Rowe Price Equity Income Fund ☐ Pretax ☐ Roth	Percentage ___ %	Fidelity® Global ex U.S. Index Fund ☐ Pretax ☐ Roth	Percentage ___ %
Target Date Mutual Funds			
Fidelity Freedom® Index 2005 Fund ☐ Pretax ☐ Roth	Percentage ___ %	Fidelity Freedom® Index 2040 Fund ☐ Pretax ☐ Roth	Percentage ___ %
Fidelity Freedom® Index 2010 Fund ☐ Pretax ☐ Roth	Percentage ___ %	Fidelity Freedom® Index 2045 Fund ☐ Pretax ☐ Roth	Percentage ___ %
Fidelity Freedom® Index 2015 Fund ☐ Pretax ☐ Roth	Percentage ___ %	Fidelity Freedom® Index 2050 Fund ☐ Pretax ☐ Roth	Percentage ___ %
Fidelity Freedom® Index 2020 Fund ☐ Pretax ☐ Roth	Percentage ___ %	Fidelity Freedom® Index 2055 Fund ☐ Pretax ☐ Roth	Percentage ___ %
Fidelity Freedom® Index 2025 Fund ☐ Pretax ☐ Roth	Percentage ___ %	Fidelity Freedom® Index 2060 Fund ☐ Pretax ☐ Roth	Percentage ___ %
Fidelity Freedom® Index 2030 Fund ☐ Pretax ☐ Roth	Percentage ___ %	Fidelity Freedom® Index 2065 Fund ☐ Pretax ☐ Roth	Percentage ___ %
Fidelity Freedom® Index 2035 Fund ☐ Pretax ☐ Roth	Percentage ___ %	Fidelity Freedom® Index Income Fund - Investor Class ☐ Pretax ☐ Roth	___ %
			Total = 100% ______

Shareholders may be subject to certain short-term trading fees. Please consult the prospectus for further information.

Need help selecting investments? See pensions.org for information and resources about Retirement Savings Plan investment options and fund performance.

4. AUTHORIZATION AND SIGNATURE

Individual Authorization: By executing this form, you:

- Certify under penalties of perjury that your Social Security number in Section 1 is correct.
- Acknowledge that you have read the prospectus of any mutual fund in which you invest and that it is your responsibility to read the prospectus(es) of any mutual fund into which you exchange and agree to its terms.
- Understand that you may designate a beneficiary for your assets accumulated in the 403(b)(9) Retirement Savings Plan of the Presbyterian Church (U.S.A.), and that if you choose not to designate a beneficiary, your beneficiary will be your surviving Covered Partner, or if you do not have a surviving Covered Partner, distributions will be made based upon the provisions of the Plan.
- Recognize that although Fidelity Management Trust Company is a bank, neither Fidelity Distributors Corporation nor any mutual fund in which your 403(b)(9) account may be invested is a bank, and mutual fund shares are not backed or guaranteed by any bank or insured by the FDIC.
- Understand that the Board of Pensions and the Retirement Savings Plan are exempt from the registration, regulation, and reporting requirements of the Securities Act of 1933, the Securities Exchange Act of 1934, the Investment Company Act of 1940, and state securities laws. Retirement Savings Plan participants and beneficiaries are not afforded the protection of those laws with respect to their interest in the Retirement Savings Plan or investments managed by the Board of Pensions.
- Understand that the Fidelity mutual fund options and the T. Rowe Price Equity Income Fund are registered mutual funds and are accordingly subject to federal securities laws.
- Understand that the PC(USA) funds are not registered mutual funds and that these proprietary funds are managed for the Board of Pensions by Fidelity Management Trust Company.

A plan document is available on pensions.org or by contacting the Board of Pensions at 800-773-7752 (800-PRESPLAN).

Your Signature: X **Date:** __ __ - __ __ - __ __ __ __

Employer Signature: X **Date:** __ __ - __ __ - __ __ __ __

FOR FIDELITY USE ONLY: **PLAN#** 5 7 8 8 7

See return instructions on front.

Fidelity Investments Institutional Operations Company, Inc.

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