CHRISTIAN BROTHERS SERVICES
Understanding Protecting Guiding

403(b) Retirement Savings Plan

Plan # 093264

ENROLLMENT FORM

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% in whole %'s or _____ fixed whole dollar amount)

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

Step 3. Investment Election

Investment of Contributions - Select investment(s) from ONE option ONLY.

Option I. Pick a single Vanguard Target Retirement Fund
Select the ONE Target Retirement Fund closest to your anticipated year of retirement (use age 65 as your guideline).
100% of your contributions will be invested in this fund.

- ☐ Vanguard Target Retirement 2060 Fund
- ☐ Vanguard Target Retirement 2055 Fund
- ☐ Vanguard Target Retirement 2050 Fund
- ☐ Vanguard Target Retirement 2045 Fund
- ☐ Vanguard Target Retirement 2040 Fund
- ☐ Vanguard Target Retirement 2035 Fund
- ☐ Vanguard Target Retirement 2030 Fund
- ☐ Vanguard Target Retirement 2025 Fund
- ☐ Vanguard Target Retirement 2020 Fund
- ☐ Vanguard Target Retirement 2015 Fund
- ☐ Vanguard Target Retirement 2010 Fund
- ☐ Vanguard Target Retirement Income Fund

Option II. Core Funds **OR**
For the following funds, specify percentages in 1% increments. The total must equal 100%.

		Allocation			Allocation
000030	Vanguard Prime Money Market Fund		000073	Vanguard Windsor II Fund	
000084	Vanguard Total Bond Market Index Fund		000642	Fidelity Blud Chip Growth Fund	
000021	Vanguard Wellington Fund		000085	Vanguard Total Stock Market Index	
000023	Vanguard U.S. Growth Fund		006095	Ave Maria Bond Fund*	
000040	Vanguard 500 Index Fund		006319	Ave Maria World Equity Fund*	
000098	Vanguard Extended Market Index Fund		000213	Vanguard FTSE Social Index Fund	
001231	Vanguard Total Int'l Bond Index Fund		000192	Aquinas Value Fund *	
000081	Vanguard International Growth Fund		006324	LKCM Aquinas Small Cap Fund *	
001967	Vanguard ST-Protected Secur Index Fund			Your allocations must total 100%	

* There is a purchase and/or a redemption fee for this fund. Please review the fund's prospectus for further details.

Step 4. Acceptance

Please sign the application and return to your Employer.

Signature of Participant Date

This form is not valid unless signed by the Participant And their Employer.

Step 5: To be Completed by Plan Sponsor

Please sign and send to Christian Brothers Retirement Planning Services

Signature of Employer Date