

*Please print*

**① General Information**

*Please use full legal name*

Full Legal Name \_\_\_\_\_  
Last First Middle Initial

Mailing Address \_\_\_\_\_  
Street City State Zip

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

SS# \_\_\_\_\_ Date of Birth \_\_\_\_\_  Male  Female

E-mail Address \_\_\_\_\_

I would like to receive E-statements and financial updates. I understand that a paper statement will not be mailed.

Spouse Name \_\_\_\_\_  
Last First Middle Initial

Spouse SS# \_\_\_\_\_ Spouse Date of Birth \_\_\_\_\_

**Participant Eligibility**

If you are not an Assemblies of God credentialed minister, proof of eligibility is required.  
(Employer signature or a copy of a W-2 form)

A retirement account cannot be opened for enrollees over age 70 with district contributions only.

Status:  AG employee  AG credentialed minister; if so, minister number \_\_\_\_\_

Title:  Rev.  Mr.  Mrs.  Ms.  Dr.

Marital Status:  Married  Single  Widowed

*Complete all blanks*

**② Employment Information**

Employment Status:  Employed  Chaplain or Evangelist  AGUSM  AGWM

Participant's Employer \_\_\_\_\_

Mailing Address \_\_\_\_\_  
Street City State Zip

Date of Hire \_\_\_\_\_ Payroll Coordinator \_\_\_\_\_

### ③ Retirement Investment Elections

Please choose one of the four following tracks and where applicable, choose the strategy in which you wish to invest within your chosen track.

*No less than 10% in one category (with increases in increments of 1%) and only five changes per quarter are allowed. All received moneys are invested three times a week and the most recent election on file will be followed. If no selection is indicated, the default investment is the MBA Income.*

#### Track 1: MBA Fixed Income Option

The MBA Fixed 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 more than 50 years ago. Your investment in this fund is used to build AG churches and ministry facilities across the country.

#### Track 2: Individual Investment Options

This option allows you to blend the MBA Fixed Income Fund with a stock strategy. The MBA Fixed Income Fund pays a fixed rate that is declared quarterly with interest compounding monthly. Loans to churches is the primary investment vehicle in the interest bearing MBA Fixed Income Fund, allowing you the choice to invest in Kingdom ministry along with or instead of the market.

MBA Fixed Income Fund (100% Fixed)	_____	%
Steward Diversified Equity Strategy (100% Stocks)	_____	%
Steward Global Equity Income Fund (100% Stocks)	_____	%
<b>Total Asset Allocation</b>	<b>100</b>	<b>%</b>

#### Track 3: Target-Date Strategies

Select the strategy below based on your target date of retirement. These **fully-screened** strategies will automatically become more conservative as that date approaches.

- 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.

- 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)

The Russell strategies offer a **non-screened active manager** investment approach.

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

*Fund prospectuses are available at [agfinancial.org/mbapropectus](http://agfinancial.org/mbapropectus) or by calling 1.800.622.7526.*

#### ④ 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 Section 5 on the next page.*

Primary      Name \_\_\_\_\_      SS# \_\_\_\_\_  
 Contingent      Address \_\_\_\_\_      Date of birth \_\_\_\_\_  
Share \_\_\_\_\_%      \_\_\_\_\_      Relationship \_\_\_\_\_

Primary      Name \_\_\_\_\_      SS# \_\_\_\_\_  
 Contingent      Address \_\_\_\_\_      Date of birth \_\_\_\_\_  
Share \_\_\_\_\_%      \_\_\_\_\_      Relationship \_\_\_\_\_

Primary      Name \_\_\_\_\_      SS# \_\_\_\_\_  
 Contingent      Address \_\_\_\_\_      Date of birth \_\_\_\_\_  
Share \_\_\_\_\_%      \_\_\_\_\_      Relationship \_\_\_\_\_

Primary      Name \_\_\_\_\_      SS# \_\_\_\_\_  
 Contingent      Address \_\_\_\_\_      Date of birth \_\_\_\_\_  
Share \_\_\_\_\_%      \_\_\_\_\_      Relationship \_\_\_\_\_

Primary      Name \_\_\_\_\_      SS# \_\_\_\_\_  
 Contingent      Address \_\_\_\_\_      Date of birth \_\_\_\_\_  
Share \_\_\_\_\_%      \_\_\_\_\_      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 listed primary or 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 children) by right of representation.

*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.*

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

*Go to Section 5 for required signatures.*

## ⑤ Signatures

### Applicant

By signing below, I hereby certify to the following:

*I have read the MBA 403(b) Retirement Plan materials and direct MBA to place my retirement plan accumulations and future contributions in the funds and percentages indicated in Section 3 of this form and direct MBA to act as designated under Section 4 of this form. 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.*

X	
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Signature of Applicant

Date

- Yes, I want a reminder to increase my contributions each year. Please send a reminder to the e-mail address listed in Section 1 of this form.

### Employer *(Employer use only)*

**Employer** signature is required below if you are **not** an AG credentialed minister.

*I verify this employee is eligible to participate based on our written plan document.  
(Employee may not sign as the employer.)*

X		
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Signature of Employer

Title of Employer

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

*Please keep a copy for your records.*