



Complete this BAA Enrollment Form in order to open an account ("BA account") under the Benefit Accumulation Account ("BAA"). You may open an account if you are a U.S. resident who is:

- a member of the Pension Plan of the Pension Fund of the Christian Church (Disciples of Christ) ("Pension Plan") or the Tax-Deferred Retirement Account of the Pension Fund of the Christian Church (Disciples of Christ) ("TDRA");
- an owner of a Traditional IRA or Roth IRA under the Defined Contribution Retirement Accounts of the Pension Fund of the Christian Church (Disciples of Christ);
- a spouse of a member or IRA owner; or
- a surviving spouse who is the member's beneficiary under the Pension Plan or TDRA.

**- PLEASE TYPE OR PRINT CLEARLY -**

**I. APPLICANT INFORMATION**

Name  Mr.  Mrs.  Miss \_\_\_\_\_  
 Ms.  Rev.  Dr. (first) (middle) (last/family)

Applicant is a (check all that apply):  Member  IRA owner  Spouse of member/IRA owner  Surviving spouse of member/IRA owner

Social Security No./ITIN \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Birth Date \_\_\_\_/\_\_\_\_/\_\_\_\_ Gender:  Male  Female

Check here if there has been a change to your contact information on file.

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Country \_\_\_\_\_ Zip Code \_\_\_\_\_ - \_\_\_\_\_

Home Phone Number (\_\_\_\_) \_\_\_\_\_ Work Phone Number (\_\_\_\_) \_\_\_\_\_ Cell Phone Number (\_\_\_\_) \_\_\_\_\_

E-Mail Address \_\_\_\_\_

Citizenship:  U.S.  Other: \_\_\_\_\_ *If you are not a US citizen, you must have an ITIN to enroll.*

Complete the following if applicant is a spouse or surviving spouse of a member or IRA owner:

Name of Member/IRA Owner \_\_\_\_\_  
(first) (middle) (last/family)

Social Security No./ITIN \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Birth Date \_\_\_\_/\_\_\_\_/\_\_\_\_ Member ID No. \_\_\_\_\_

**II. CONTRIBUTION INFORMATION**

There is a minimum \$25 initial deposit required. Indicate contribution type below (check one or more as applicable):

**Required Minimum Distributions.** I authorize the required minimum distributions from my (check all applicable)  TDRA account  Traditional IRA with Pension Fund to be made to my BA account. *Note: Required minimum distributions will be taxed to you before deposit in a BA account and you must also complete the applicable TDRA or IRA distribution form requesting required minimum distributions.*

**Pension Plan Distributions.** I authorize (check one only)  100% of my monthly Pension Plan payments  an amount equal to \$ \_\_\_\_\_ or \_\_\_\_\_% of my monthly Pension Plan payments to be made to my BA account. *Note: Pension Plan payments will be taxed to you before deposit in your BA account and you must also complete the Pension Plan distribution form requesting your pension benefits to begin.*

**Salary Continuation Death Benefit (for surviving spouse only).** I authorize my salary continuation death benefit from the Pension Plan to be made to my BA account.

**Single Sum Contribution.** I am remitting an initial after-tax contribution amount to my BA account equal to \$ \_\_\_\_\_.

This contribution is being made by  check (including checks sent by or through your bank)  
 payroll deduction from my employer (unless made by employer check, complete Employer Authorization Agreement for One-Time Debit (ACH))  
 one-time debit (ACH) from my bank account (complete the bank information below)

For future contributions, complete the BAA Contribution Form or elect to make recurring contributions below.

**Recurring Contributions.** Effective as soon as administratively practicable on or after \_\_\_\_\_, 20\_\_\_\_, I authorize recurring after-tax contributions to be made to my BA account equal to \$ \_\_\_\_\_.

These contributions will be made by  payroll deduction from my employer (unless made by employer check, complete Employer Authorization Agreement for Recurring Debit (ACH))

automatic debit (ACH) from my bank account (complete the bank information below).  
 Recurring contributions will be debited on the (check one only)  1<sup>st</sup>  15<sup>th</sup> day of each month.

**Complete below if you elect a one-time or recurring bank debit and attach a "void" check to this Form:**

Name of Bank \_\_\_\_\_ Account Holder Name \_\_\_\_\_  
 Mailing Address of Bank \_\_\_\_\_ Phone Number (\_\_\_\_) \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Country \_\_\_\_\_ Zip Code \_\_\_\_\_ - \_\_\_\_\_  
 Account Number \_\_\_\_\_ Bank Routing/ABA Number \_\_\_\_\_  Checking  Savings

**III. BACKUP WITHHOLDING**

I certify that (check one only):

- I am not subject to backup withholding because I am exempt from backup withholding, or I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or the IRS has notified me that I am no longer subject to backup withholding.
- I have been notified by the IRS that I am currently subject to backup withholding because I failed to report all interest and dividends on my tax return.

**IV. DESIGNATION OF BENEFICIARIES**

Designate the person, trust or entity you choose to receive any benefits payable from your BA account in the event of your death. If you designate a trust as a beneficiary, include the trust's name and address, the date the trust was created, and the trustee's name. You are not limited to two primary and two contingent beneficiaries. To designate additional beneficiaries, please attach and sign a separate piece of paper stating the additional names and identifying information.

Unless otherwise indicated, death benefits will be paid in equal shares to your primary beneficiaries who are living at the time of your death. If no primary beneficiary is living at your death, unless otherwise indicated, death benefits will be paid in equal shares to your contingent beneficiaries who are living at the time of your death. If you name multiple primary or contingent beneficiaries, and one of them predeceases you, the percentage of that beneficiary's designated share shall be divided equally amongst the surviving primary or contingent beneficiaries, as applicable.

**IMPORTANT: If you do not elect a beneficiary, or if your beneficiaries named on this BAA Enrollment Form fail to survive you, your benefits will be paid to your estate. Failure to include a social security number/ITIN and current contact information for each designated beneficiary, if applicable, may delay distributions at your death.**

Primary Beneficiaries <i>The total percentage to all primary beneficiaries must equal 100%.</i>	Percentage of Benefit
Individual or Trust Name _____ <small>(first, middle, last/family name)</small> Mailing Address _____ <small>(street, city, state, zip code)</small> Primary Phone (____) _____ Relationship to Applicant/Trustee Name _____ Social Security No./ITIN ____ - ____ - ____ Birth or Trust Date ____ / ____ / ____	_____ %
Individual or Trust Name _____ <small>(first, middle, last/family name)</small> Mailing Address _____ <small>(street, city, state, zip code)</small> Primary Phone (____) _____ Relationship to Applicant/Trustee Name _____ Social Security No./ITIN ____ - ____ - ____ Birth or Trust Date ____ / ____ / ____	_____ %
Contingent Beneficiaries If all of your primary beneficiary(ies) die before you, any benefits payable in the event of your death will be paid to your contingent beneficiary(ies). <i>The total percentage to all contingent beneficiaries must equal 100%.</i>	Percentage of Benefit
Individual or Trust Name _____ <small>(first, middle, last/family name)</small> Mailing Address _____ <small>(street, city, state, zip code)</small> Primary Phone (____) _____ Relationship to Applicant/Trustee Name _____ Social Security No./ITIN ____ - ____ - ____ Birth or Trust Date ____ / ____ / ____	_____ %

