

ENROLLMENT APPLICATION

403(b)(9) RETIREMENT PLAN FOR SOUTHERN BAPTIST SELF-EMPLOYED MINISTERS

PARTICIPANT INFORMATION

Participant name: ☐ Miss ☐ Ms. ☐ Mrs. ☐ Mr. ☐ Dr. ☐ Rev.

First: _____ MI: _____ Last: _____

Social Security number: _____ Birth date: _____

Gender: ☐ Male ☐ Female Marital status: ☐ Married ☐ Single

Mobile phone: _____ Email address: _____

Home address: _____

City: _____ State: _____ ZIP code: _____

Spouse first name: _____ MI: _____ Last: _____

Spouse Social Security number: _____ Spouse birth date: _____

☐ I am a NAMB-endorsed chaplain or evangelist.

CONTRIBUTION INFORMATION

I am a (choose one of the two options below):

☐ **A. Self-employed minister** (receives 1099 income) and (choose one or both of the options below):

☐ I will make employer contributions of: \$ _____

☐ I will make Roth elective deferral contributions of: \$ _____

Roth elective deferral contributions are irrevocable once the amount is withheld and paid to the Plan, and any change can only be prospective. Roth elective deferral contributions are not eligible for a tax deduction.

☐ **B. Foreign missionary** who is ordained, licensed or commissioned as a minister and serves outside the United States. I will make after-tax employer missionary contributions of: \$ _____

After-tax employer missionary contributions are not eligible for a tax deduction.

Total contributions: \$ _____

FINANCIAL INSTITUTION INFORMATION

Financial institution name: _____

City: _____ State: _____ ZIP code: _____

Name on account: _____

Routing number: _____ Account number: _____

Telephone number: _____

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CHOOSE YOUR FUNDS

You have the right to make plan investment elections for contributions made on your behalf to the retirement plan. Your employer has designated a Target Date Fund based on your age as your default investment to which contributions will be made if you do not select an option below. All contributions will be placed in this fund until you change your election, and you have sole responsibility for this default election.

OPTION 1 — ASSET ALLOCATION FUNDS / DO IT FOR ME

Our professionally managed asset allocation options provide a simple choice for those who want a one-step approach to investing. This investment selection includes both our Target Date Funds and Target Risk Funds.

GUIDESTONE TARGET DATE FUNDS

Choose the appropriate MyDestination Fund® that most closely corresponds to the year in which you plan to retire.

(Not applicable if you completed Option 2 or selected a Target Risk Fund below.)

- ☐ MyDestination 2015 Fund ☐ MyDestination 2035 Fund ☐ MyDestination 2055 Fund
☐ MyDestination 2025 Fund ☐ MyDestination 2045 Fund

GUIDESTONE TARGET RISK FUNDS

Choose the (one) fund that best represents your investor profile.

(Not applicable if you completed Option 2 or selected a Target Date Fund above.)

- ☐ Conservative — Conservative Allocation Fund ☐ Moderately aggressive — Moderately Aggressive Allocation Fund
☐ Moderately conservative — Balanced Allocation Fund ☐ Aggressive — Aggressive Allocation Fund

OPTION 2 — CORE AND SPECIALITY OPTIONS / DO IT MYSELF

This approach is designed to help you build your own portfolio utilizing a broad range of core and specialty funds that provide the flexibility to address specific investment strategies. **Once enrolled, you will always have access to make fund exchanges through your online MyGuideStone® account. (Not applicable if you completed Option 1.)**

- ☐ Use this option if you choose to mix your own portfolio from the core and specialty options.

Investment fund: _____ Percentage: _____%

Investment fund: _____ Percentage: _____%

Investment fund: _____ Percentage: _____%

Total (must equal 100%): _____%

Please write in the space below or on a separate page for more than three fund choices.

Participants are prohibited from exchanging out of the Capital Preservation Fund (if applicable) to a “competing fund” without first investing in a “non-competing fund” for a period of at least 90 days. Also, simultaneous exchanges are not allowed. For more complete information, visit GuideStone.org or call **1-888-98-GUIDE** (1-888-984-8433).

REQUIRED SIGNATURE

This election will remain in effect until I revoke it in writing or until I call a customer solutions specialist. By signing this form, I am accepting the terms of the Plan.

Participant signature: _____ Date: _____

Return your completed form to: Retirement Operations
GuideStone
5005 LBJ Freeway, Ste. 2200
Dallas, TX 75244-6152

Or you may fax your form to: 1-866-692-6327

ELIGIBILITY REQUIREMENTS AND PARTICIPANT RESPONSIBILITIES

403(b)(9) Retirement Plan for Southern Baptist Self-Employed Ministers

By enrolling in the Plan, you certify that you have read and currently meet the eligibility requirements for the Plan. You also certify that you have read, understand and accept your responsibilities as a participant in the Plan.

GENERAL DIRECTIONS FOR COMPLETING THE ENROLLMENT APPLICATION

- You can save time by calling **1-888-98-GUIDE** (1-888-984-8433) and enroll by phone, or enroll online at our website *GuideStone.org*.
- This form must be typed or completed in ink. If you make any changes to the written information, initial the changes.
- Use this form to enroll in the Plan. To make contributions to the Plan, you must be a self-employed minister. See below for the eligibility requirements. It is your responsibility to determine whether or not you are eligible to participate in the Plan.
- If your employment situation changes and you are no longer eligible to participate in the Plan, **it is your responsibility to notify GuideStone® immediately of your change in status**. There may be adverse tax consequences if you continue to participate in the Plan, but do not meet and continue to meet the eligibility requirements.

YOU MUST MEET THE FOLLOWING ELIGIBILITY REQUIREMENTS

- **Ministerial requirements:** You are a duly ordained, licensed or commissioned Southern Baptist minister of the gospel* **and**
- **Employment status requirements:** You are receiving income from performing services as a Southern Baptist minister.

Is this 1099-MISC self-employment income?

If you answered “**yes**” to this question, then you are eligible to participate in this Plan.

If you answered “**no**” to this question, then you are not eligible to participate in this Plan.

RESPONSIBILITIES

- To remit contributions to GuideStone
- To maintain service, compensation and contribution records
- To report to government agencies, as appropriate
- To provide prompt notice to GuideStone when the participant’s ministry ceases to be within the bounds of the Southern Baptist Convention
- Any other duties necessary or applicable with respect to the Plan and not specifically set forth as a duty of GuideStone within the Plan

If your employment situation changes and you are no longer eligible to participate in the Plan, you must notify GuideStone immediately of your change in status. There may be adverse tax consequences if you participate in the Plan but fail to meet the eligibility requirements.

*If you are currently employed with a Southern Baptist church, please contact a GuideStone customer solutions specialist at **1-888-98-GUIDE** (1-888-984-8433) to discuss the benefits of participating in the Church Retirement Plan.