

# Washington Central Unified Union School District 403(b) Plan

## Enrollment Form

Plan ID: WCS

### Section 1: Personal Information

Name: \_\_\_\_\_ SSN: \_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_

Address: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

City \_\_\_\_\_ Date of Hire: \_\_\_\_/\_\_\_\_/\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_ Rehire:  Yes  No

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

### Section 2: Deferral Elections

#### Choose Deferral Rate

- I wish to contribute the following percentage of my compensation to my Retirement Account  
\_\_\_\_\_ % of my compensation per pay period as Traditional deferral (pre-tax).

Total deferrals cannot exceed 100% of your compensation or the annual IRS limit. Other limitations may apply.

- I decline to make contributions to the Plan at this time.

**Please complete and sign reverse side if enrolling**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Section 3: Investment Elections (Use whole percentages that total 100%)**

**Risk Based Portfolios**

MANNING & NAPIER PRO BLEND MOD	Allocation--30% to 50% Equity	EXBAX	_____	%
AMERICAN FDS AMERICAN BALANCED	Allocation--50% to 70% Equity	RLBGX	_____	%

**Target Date Portfolios**

VANGUARD TARGET RETIREMNT INC	Target-Date Retirement	VTINX	_____	%
VANGUARD TARGET RETIRE 2015	Target-Date 2015	VTXVX	_____	%
VANGUARD TARGET RETIRE 2020	Target-Date 2020	VTWNX	_____	%
VANGUARD TARGET RETIRE 2025	Target-Date 2025	VTTVX	_____	%
VANGUARD TARGET RETIRE 2030	Target-Date 2030	VTHRX	_____	%
VANGUARD TARGET RETIRE 2035	Target-Date 2035	VTTHX	_____	%
VANGUARD TARGET RETIRE 2040	Target-Date 2040	VFORX	_____	%
VANGUARD TARGET RETIRE 2045	Target-Date 2045	VTIVX	_____	%
VANGUARD TARGET RETIRE 2050	Target-Date 2050	VFIFX	_____	%
VANGUARD TARGET RETIRE 2055	Target-Date 2055	VFFVX	_____	%
VANGUARD TARGET RETIRE 2060	Target-Date 2060	VTTSX	_____	%

**Build Your Own Portfolio / Individual Investment Options**

STATE ST INSTL US GOVT MMKT	Money Market - Taxable	SALXX	_____	%
VANGUARD SHORT TERM INV GRADE	Short-Term Bond	VFSUX	_____	%
BAIRD AGGREGATE BOND	Intermediate Core Bond	BAGIX	_____	%
LOOMIS SAYLES BOND FUND	Multisector Bond	LSBDX	_____	%
AMERICAN CENTURY INFL ADJ BOND	Inflation-Protected Bond	AIANX	_____	%
MFS VALUE FUND	Large Value	MEIKX	_____	%
VANGUARD FIVE HUNDRED INDEX FD	Large Blend	VFIAX	_____	%
HARBOR CAPITAL APPRECIATION FD	Large Growth	HACAX	_____	%
VANGUARD MID CAP INDEX FUND	Mid-Cap Blend	VIMAX	_____	%
DFA US TARGETED VALUE	Small Value	DFVFX	_____	%
VANGUARD SMALL CAP INDEX FUND	Small Blend	VSMAX	_____	%
CARILLON EAGLE SM CAP GRWTH	Small Growth	HSIIX	_____	%
OAKMARK INT'L INVESTOR	Foreign Large Value	OAKIX	_____	%
VANGUARD FTSE ALL WRLD EX US	Foreign Large Blend	VFWAX	_____	%
DFA EMERGING MARKETS PORTFOLIO	Diversified Emerging Mkts	DFEMX	_____	%
PRINCIPAL GLOBAL REAL ESTATE S	Global Real Estate	POSIX	_____	%

TOTAL 100%

**REBALANCING:** If you've selected multiple investments above, you may consider setting up recurring rebalance. This can be done by selecting Rebalance under the Transaction heading, and following the prompts. If you need assistance, please contact the Participant Service Center.

**Section 4: Authorization**

I have been provided adequate information regarding this plan to make the elections above. I understand the contribution elections will remain in effect until I otherwise notify the Plan's Administrator and revise my contribution elections. I further understand the Investment Election made above will remain in effect until and unless I revise it using a medium approved by the Plan's Administrator.

Participant Signature \_\_\_\_\_ Date: \_\_\_\_\_

For more information about your plan's investments, go to <https://rec-files.epicrps.com/funds>.