Vanguard Section 403(b)(7) Custodial Account - Non-Erisa

Christian Brothers
Retirement Savings Plan

Plan # 093264

Enrollment/Change

Step 1: Account Information

Check one: ☐ New Enrollment ☐ Address Change ☐ Payroll Change

Social Security # **Location Code**

Name
(Last, First, MI)

Home Address

City **State** **Zip**

Date of Birth
(mm/dd/yyyy)

Date of Hire
(mm/dd/yyy)

Plan Entry Date
(mm/dd/yyy)

Daytime Phone # **Evening Phone #**

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)

☐ **0% - I do not wish to participate in the Christian Brothers Retirement Savings Plan.**

☐ **0% - I wish to suspend my contributions to the 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 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 2005 Fund
- ☐ Vanguard Target Retirement Income Fund

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

Fund Code	Fund Name	Allocation
000030	Vanguard Prime Money Market Fund	
000084	Vanguard Total Bond Market Index Fund	
000021	Vanguard Wellington Fund	
000023	Vanguard U.S. Growth Fund	
000040	Vanguard 500 Index Fund	
000073	Vanguard Windsor II Fund	
000213	Vanguard FTSE Social Index Fund	
000085	Vanguard Total Stock Market Index	
000081	Vanguard International Growth Fund	
002341	Aquinas Value Fund	
000632	Fidelity Blue Chip Growth Fund	

Your allocations must total 100%

Step 4. Acceptance

Please sign the application and return to the Christian Brothers Retirement Services Benefits Office.

Signature of Participant Date

Step 5: To be Completed by Plan Sponsor

Signature of Plan Sponsor Date

Please make a copy for your records.