

Elective Deferral and Vendor Election Instructions

You can use the website to make changes in the amount you wish to defer, as well as to make changes in your vendors. The CPI Participant Website can be accessed 24 hours a day, 7 days a week. If you do not have internet access you can enroll in the 403(b) plan maintained by Southern Ohio Educational Service Center using the Elective Deferral and Vendor Election Form which can be obtained by contacting the CPI Participant Service Center at (877) 488-4040. New employees must complete all sections. Current participants need to complete the applicable sections to make changes to their current elective deferral amounts or their vendor(s). The instructions for each section of this form are provided below:

At the top of the form, the eligible Employee/Participant should check one of the options to indicate the reason for completing the form in order to ensure complete processing.

Section A	Your Info All Employees/Participants completing this form must enter the information requested in this section as indicated so that they will be properly identified as the originator of the election form.
------------------	--

Section B	Your Election New Employees must complete this section and indicate the dollar amount they wish to contribute to the plan as a Pre-tax Elective Deferral. Current Participants should complete this section if they wish to change the dollar amount they are currently deferring to the plan as a Pre-tax Elective Deferral. Your deferrals will start once your Employer has had sufficient time to update their payroll system. If you do not see your deferral starting within a reasonable time, please contact your Employer.
------------------	---

Section C	Your Vendor Direction The vendors approved to receive current contributions are listed in this section. New Employees enrolling in the plan must complete this section of the form to choose the vendors to which they wish to invest contributions and to indicate the dollar amount that will be allocated to each vendor. Current participants should complete this section if they wish to make changes with whom they are investing their contributions. You must also indicate the account/contract number to which the monies are being allocated with the appropriate vendor. This information should be provided to you by the vendor at the time you opened the account/contract. If you have not established the account/contract, you cannot select the new vendor at this time. Once this information has been provided, CPI will input the election(s) amount along with the vendor(s) you have chosen for such allocations. Participants should complete the Employer Matching and Discretionary section(s), whether or not they are eligible. Since Southern Ohio Educational Service Center will be determining the amount to be allocated, we ask that you indicate the percentage that is to be allocated to each vendor.
------------------	---

Section D	Sign New employees and current participants should read this section carefully and sign where indicated in order for their election(s) to take effect.
------------------	--

Mailing Instructions:

Upon completion of the Elective Deferral and Vendor Election Form, the form should be mailed, faxed, scanned or e-mailed to the following address:

Southern Ohio ESC
3321 Airborne Rd
Wilmington, Ohio 45177
Fax: 937-383-3171
Email: so_aunversaw@mveca.org

Elective Deferral and Vendor Election Form

Plan Name: Southern Ohio Educational Service Center 403(b) Plan

Ref. No. 106097

- | | |
|---|---|
| <input type="checkbox"/> To Enroll: Complete All Sections | <input type="checkbox"/> To Change Contribution Amount: Complete Sections A, B and D |
| <input type="checkbox"/> To Change Vendors: Complete Sections A, C and D | <input type="checkbox"/> To Change Contract/Account Number: Complete <u>All</u> Sections |

Please type or print clearly

--	--	--	--	--	--	--	--	--	--	--	--

Section A
Your Info

Last Name _____ First Name _____ M. I. _____ Social Security Number (SSN) _____
 Email Address: _____ Daytime Phone Number: (____) _____

Section B
Your Election

- Salary Deferral** – I instruct my employer to deduct \$ _____ of my pay on a pre-tax basis each pay period for investment with the specified vendors below.
 (In the space provided, enter a dollar amount.)

Please indicate how you are making your election as a dollar amount

I direct that all future contributions be invested with the following vendor(s). Enter a dollar amount. If you have not established the account/contract, you cannot select the new vendor at this time.

Section C
Your Vendor Direction

Vendor Name	Amount	Account/Contract Number
American Fidelity Assurance Company		
AXA Equitable		
ING Life Insurance and Annuity Company (non 457 plan contribution)		
The Variable Annuity Life Insurance Company		
The Vanguard Group		
Total Dollar Amount		

Employer Post Retirement Contributions – Appendix G (Only fill this section out if you have been directed by the Treasurer). Please indicate below which vendor(s) you would like for your employer discretionary contribution to be invested with by providing the name of the vendor(s) and the percentage that is to be allocated.

I direct that all future employer matching contributions be invested with the following vendor(s). Enter whole percentages in multiples of 1%. I.e., 25%, 50%, 100%. Total percentage amount must equal 100%. If you have not established the account/contract, you cannot select the new vendor at this time.

Section C
Your Vendor Direction

Vendor Name	Percentage	Account/Contract Number
American Fidelity Assurance Company		
AXA Equitable		
ING Life Insurance and Annuity Company (non 457 plan contribution)		
The Variable Annuity Life Insurance Company		
The Vanguard Group		
Total %		

By signing this form, I have authorized the Employer to deduct the amount(s) elected from my paycheck and transmit the contributions to the vendors as indicated. I certify that I have established a 403(b) account with the vendors selected above.

Section D
Sign

_____ Date _____
 Participant