

Enrollment and Contribution Form

Use this worksheet to submit your employee information and/or any applicable contribution information elections to your employer for enrollment in your SACRAMENTO EMPL & TRAINING MissionSquare Retirement Health Savings Plan at MissionSquare Retirement.

I want to: Start My Journey: Join my SACRAMENTO EMPL & TRAINING MissionSquare Retirement Health Savings Plan

1. PERSONAL INFORMATION

PLAN SPONSOR NAME: SACRAMENTO EMPL & TRAINING MissionSquare Retirement Health Savings Plan 801959			
SOCIAL SECURITY NUMBER: FOR TAX REPORTING PURPOSES		DATE OF BIRTH: MM/DD/YYYY	GENDER: <input type="checkbox"/> FEMALE <input type="checkbox"/> MALE <input type="checkbox"/> OTHER
FULL NAME: LAST, FIRST, MI		MARITAL STATUS: <input type="checkbox"/> MARRIED <input type="checkbox"/> SINGLE <input type="checkbox"/> WIDOWED <input type="checkbox"/> DIVORCED	
MAILING ADDRESS:			
STREET		CITY	STATE ZIP
MOBILE PHONE NUMBER:	EMAIL ADDRESS:	GO PAPERLESS: <input type="checkbox"/>	

*Choosing to go paperless means you are asking your employer to opt you into electronic communications to the email address you have designated.

2. INVESTMENT SELECTION

By submitting this form, you understand you are authorizing your plan sponsor to enroll you in the plan without elections. Once your enrollment is processed you may log in to the participant website or mobile app to select your investments. If you do not select an investment option, your entire account will be invested in the Plan's default investment selection.

3. SURVIVOR DESIGNATION

Once your enrollment is processed you may log in to the participant website or mobile app to enter your survivor information.

4. SIGNATURES (SIGN, DATE, AND SUBMIT THE COMPLETED FORM TO YOUR PLAN SPONSOR)

Employee Signature: _____ Date: MM/DD/YYYY _____
 Authorized Plan Sponsor Official's Signature: _____ Date: MM/DD/YYYY _____
 Authorized Plan Sponsor Official's Name and Title: _____ Date: MM/DD/YYYY _____

SUBMIT THE COMPLETED WORKSHEET TO YOUR PLAN SPONSOR. RETAIN A COPY FOR YOUR RECORDS.

For Plan Sponsor Use Only:

Employee ID: _____ Hire Date: MM/DD/YYYY _____

Rehired? Check if Yes

Rehire Date: MM/DD/YYYY _____ Original Hire Date: MM/DD/YYYY _____ Leave Date: MM/DD/YYYY _____