

## Quick Enrollment Form

### ENROLLMENT INSTRUCTIONS

I want to enroll in the TexaSaver 457 Plan today and contribute:

- ☐ \$ \_\_\_\_\_ per month of my eligible compensation as before-tax contribution (minimum \$20)
- ☐ \$ \_\_\_\_\_ per month of my eligible compensation after tax as a designated Roth contribution (minimum \$20)

### PERSONAL INFORMATION (please print)

Name \_\_\_\_\_ ☐ Male ☐ Female

Date of Birth \_\_\_\_\_ Social Security Number \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

Email Address \_\_\_\_\_

Agency Name \_\_\_\_\_

☐ Married ☐ Unmarried

### PARTICIPATION AGREEMENT

**Investment Option:** I understand that this form is my election to enroll in the Plan. By signing this form, my contributions will be allocated to the Plan's default fund without additional action by me. The Plan's default fund is a default target date investment option that most closely matches my estimated retirement age on my birth date. If I wish to contribute to any of the Plan's investments options other than the default fund, I understand that I must contact my Plan Administrator or local representative to obtain a Participant Enrollment Form. I acknowledge that information about the default target date investment options and information about other Plan investment options, including prospectuses, disclosure documents, and fund data sheets, have been made available to me.<sup>1</sup> I understand the risks of investing and that all payments and account values may not be guaranteed and may fluctuate in value. I understand that funds may impose redemption fees on certain transfers, redemptions or exchanges if assets are held less than the period stated in the funds's prospectus or other disclosure documents. I understand that I can change my investment allocation at any time by logging on to my account at [www.texasaver.com](http://www.texasaver.com) or by calling (800) 634-5091.<sup>2</sup> A personal identification number (PIN) that gives you access to your account via the website or phone will be mailed to you soon after your application is processed.<sup>3</sup> For more information, please contact your Plan Administrator.

**My Account:** I understand that it is my obligation to review all confirmations and quarterly statements for discrepancies and errors. If I do not communicate a request for correction within 90 days from the date of the statement, account information shall be deemed accurate and acceptable to me.

**Beneficiary Designation:** I understand that I must choose a beneficiary of my account by filing a separate beneficiary designation form. Until a signed beneficiary designation form is received, the beneficiary will be determined in accordance with the terms of the TexaSaver Plan and Trust Document.<sup>4</sup>

I understand that a deferral agreement must be entered into prior to the first day of the month that the deferral will be made. By signing this form, I acknowledge that I have previously received detailed information about the TexaSaver Program and understand that my participation in the 457 Plan must be in compliance with requirements and terms of the TexaSaver Plan and Trust Document and the Internal Revenue Code. I understand that the Service Center is required to comply with the regulations and requirements of the Office of Foreign Assets Control, Department of the Treasury ("OFAC"). As a result, the Service Center cannot conduct business with persons in a blocked country or any person designated by OFAC as a specially designated national or blocked person. For more information, please access the OFAC website at: <http://www.treasury.gov/about/organizational-structure/offices/Pages/Office-of-Foreign-Assets-Control.aspx>.

Participant Signature \_\_\_\_\_

Date \_\_\_\_\_

<sup>1</sup> Age-based investment options are generally mutual funds or asset allocation models that are intended to invest in a manner appropriate for participants and beneficiaries within a particular age group, and options based on established target retirement dates generally invest their asset allocations more conservatively over time as the target date approaches. Typically, age-based options invest a larger percentage of their assets in equity securities for younger participants and gradually transfer those assets to fixed income securities as participants within an age group grow older. The principal value of the fund(s) is not guaranteed at any time, including the target date. Please see each option's prospectus or disclosure document for more information.

<sup>2</sup> Access to the InformationLine and website may be limited or unavailable during periods of peak demand, market volatility, systems upgrades/maintenance or other reasons.

<sup>3</sup> The account owner is responsible for keeping the assigned PIN confidential. Please contact the TexaSaver Program immediately if you suspect any unauthorized use.

<sup>4</sup> If there are any discrepancies between this document and the TexaSaver Plan and Trust Document, the TexaSaver Plan and Trust Document will govern.

**Core securities, when offered, are offered by TexaSaver Program through GWFS Equities, Inc. GWFS Equities, Inc. is a wholly owned subsidiary of Great-West Life & Annuity Insurance Company.**

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