



Burnt Hills-Ballston Lake Central School District 403(b) Plan Enrollment/Investment Selection Form

Social Security Number Last Name First name

Address

City State Zip Date of Birth Date of Hire

Email (statements will be sent electronically unless you opt out)

Opt out of electronic delivery of statements.

Salary Deferral Election

- Please deduct _____% or \$ _____ of my compensation each pay period for contribution and allocation to my retirement account.
- I am age 50 or over and would like to make a catch-up contribution in the amount of \$ _____ (max \$6000).
- I will not contribute to the plan, but will make the following investment selections for any employer contribution made on my behalf (If applicable).

Automatic Rebalancing

Rebalance my account so that my fund balances match my investment elections - monthly quarterly semi-annually annually
Begin my rebalancing on the following date: _____

Investment Elections (Choose from Do-it-yourself OR Auto-Pilot – Not Both)

Do it Yourself (Enter whole percentages)		Auto-Pilot Investing (Choose the <u>one fund</u> whose date most closely matches the date you plan to retire)
Vanguard Federal Money Market Fund (Money Market) _____%	Vanguard Total Stock Market Index Fund (Large Company Blend Stock) _____%	
Vanguard Total Bond Market Index Fund (Intermediate Term Bonds) _____%	Vanguard S&P 500 Fund (Large Company Blend Stock) _____%	Do not check a box in this column if you made elections in the adjacent column
Vanguard Intermediate Term Treasury Fund (Intermediate Term Gov't Bonds) _____%	Parnassus Equity Income Fund (Large Co. Blend/Socially Resp.) _____%	
Vanguard Wellington Fund (Moderate Allocation / Balanced) _____%	T. Rowe Price Value Fund (Large Company Value) _____%	Vanguard Target Retirement Income <input type="checkbox"/>
T. Rowe Price Capital Appreciation Fund (Moderate Allocation / Balanced) _____%	American Funds New Perspective Fund (World Stock) _____%	Vanguard Target Retirement 2015 <input type="checkbox"/>
Vanguard Selected Value Fund (Medium Company Value Stock) _____%	Hartford International Opportunities Fund (Foreign Company Value Stock) _____%	Vanguard Target Retirement 2025 <input type="checkbox"/>
Vanguard Mid Cap Index Fund (Medium Company Blend Stock) _____%	American Funds EuroPacific Growth Fund (Foreign Company Blend Stock) _____%	Vanguard Target Retirement 2035 <input type="checkbox"/>
Fidelity Low-Priced Stock Fund (Medium Company Blend Stock) _____%	Vanguard REIT Index Fund (Specialty – Real Estate) _____%	Vanguard Target Retirement 2045 <input type="checkbox"/>
Goldman Sachs Growth Opportunities Fund (Medium Company Growth Stock) _____%		Vanguard Target Retirement 2055 <input type="checkbox"/>
Vanguard Small Company Index Fund (Small Company Blend Stock) _____%	Total 100%	
American Beacon Small Cap Value Fund (Small Company Value Stock) _____%		Check only one box
Franklin Growth Fund (Large Company Growth Stock) _____%		

Your signature below acknowledges that you have received and read investment information on each fund selected above. You acknowledge that you are aware that the official fund prospectus are available on the plan website or from the Plan sponsor and you should read them before you invest. You acknowledge that incomplete or illegible investment elections may result in your account being invested in the qualified default investment fund designated by the Plan and disclosed in this enrollment book. **Duty to review pay records:** I understand, I have a duty to review my pay records (pay stub, etc.) to confirm the Employer properly implemented my salary reduction election. Furthermore, I have a duty to inform the Plan Administrator if I discover any discrepancy between my pay records and the Salary Reduction Agreement. I understand the Plan Administrator will treat my failure to report any withholding errors to any payroll to which my Salary Reduction Agreement applies, by the cut-off date for the next following payroll, as my affirmative election to defer the amount actually withheld (including zero). However, I thereafter may modify my deferral election prospectively, consistent with the Plan terms.

Participants Signature: _____ Date: _____