

Instructions for Completion of Participant Enrollment Form

Participant Enrollment Form

Employment Information – page 1 of 2: Enter, to the best of your knowledge, the date you first became a Southern Methodist Minister or Annual or General Conference employee.

Participant Election – check first box and put 3% in the first blank.

Participant Acknowledgement and Signature – page 2 of 2: Answer the two questions at the bottom of the page and sign and date.

Investment Option Election Form

Pages 1 and 2 of 4: This is where you choose how you want your personal money invested. Your investment options MUST add up to 100% at the end. The **AmerCent Choice** funds on the bottom of page 1 and the top of page 2 followed by numbers represent target dates closest to your projected retirement date. You can choose ONE of these and put 100% of your money into it and AUL will develop a portfolio for you, more aggressive at first, then more conservative the closer you get to retirement age. (If you need any help with this section, just give the Plan Administrator a call. AUL cannot assist you with investment advice).

Page 3 of 4: Sign and date.

Participant Beneficiary Designation Form

Page 2 of 4: Answer questions concerning **Marital Status** and **Election of Pre-Retirement Death Benefit**

Page 3 of 4: List your Beneficiary or beneficiaries.

Page 4 of 4: Print your name, sign and date. The Plan Administrator can serve as the witness.

Spousal Authorization – NOTE: If you are married your **spouse MUST sign this section!** The Plan Administrator can serve as the witness.

Return ALL completed Forms to the Plan Administrator for authorization and signatures. They will then be forwarded to AUL for enrollment. Return to:

Rev. Dr. Paul D. Thigpen
Plan Administrator/Treasurer
212 Walnut Lane
Columbia, SC 29212

Remember that a **Quarterly Contribution Form** must also be sent to the above address by your church or employer along with your first contribution **PRIOR TO THE END OF EACH QUARTER** to ensure that you receive your Pro-rata shares for each quarter.

Also remember that **Full Vesting** in the Program is achieved after **5 years**, 20% per year until then.

That's it! You're done. Thanks for caring about your future needs.