



United Methodist Personal Investment Plan Enrollment Information

Enrollment Form

To begin participation in the benefit plans, you must be enrolled in the plans for which you are eligible to participate. At the time of enrollment, the General Board of Pension and Health Benefits (General Board) needs certain information from you and your employer (plan sponsor). The General Board uses the enrollment form to enroll you in the plan(s) and to receive information.

Simply follow these steps:

1. Complete Part 1 as applicable.
2. Return the enrollment form to your plan sponsor. Your plan sponsor will complete the rest of the form and send it to the General Board.

Designation of Beneficiary Form

The designation of beneficiary form allows you to choose the person or persons to whom the General Board will pay benefits in the event of your death prior to receiving plan benefits. Please complete the form and send it to the General Board in the enclosed envelope.

Before-tax and After-tax Contributions Agreement

The before-tax and after-tax contributions agreement is an agreement between you and your plan sponsor, specifying the amount you wish to contribute to the United Methodist Personal Investment Plan (UMPIP) on a before-tax or after-tax basis. You will specify the amount as a percentage of compensation or a dollar amount, as well as the effective date of the contributions. Your plan sponsor will deduct the amount from your paycheck and remit it to the General Board.

Investment Election Form

The investment election form is used to advise the General Board the way in which you want to invest your UMPIP contributions. With this form, the General Board will establish your account and apply your UMPIP contributions as you direct.

Complete and return the form to the General Board in the enclosed envelope before your plan sponsor sends the first contribution to UMPIP. If you do not, the General Board will invest your contributions using LifeStage.

Rollover Form

The rollover form can be used to roll over account balances from retirement plans with prior employers or from Individual Retirement Accounts (IRAs) to UMPIP. If you are interested in making a rollover, please complete Part 1 of the form and return it to the General Board with a copy of your latest statement of account from that plan or IRA.