



Annuity Plan Membership and Other Benefit Plans

EMPLOYER ID: _____ [] NEW EMPLOYER
MEMBER ID: _____ [] EXISTING MEMBER*

*If you are an existing member and/or annuitized your previous account, please provide your Member ID number above, and your name in the Personal Information section below. Only complete the section(s) of the form that are being changed or updated. Your Employer must sign the form.

PERSONAL INFORMATION

SSN: _____ Gender: [] M [] F Date of Birth: ____/____/____ Title: [] Rev. [] Dr.
Relationship Status: [] Single [] Married [] Divorced [] Widowed [] Civil Union [] Domestic Partner
Name of Member (last, first, middle initial): _____
Address: _____ City _____ State _____ ZIP _____
Cell Phone: (____) ____ - ____ Home Phone: (____) ____ - ____ Email: _____

SPOUSE / PARTNER INFORMATION (if applicable)

Name of Spouse / Partner (last, first, middle initial): _____
SSN: _____ Date of Birth: ____/____/____ Date of Marriage: ____/____/____

EMPLOYEE INFORMATION

Employee Type: [] Clergy [] Lay For Clergy Only - Ordination Date: ____/____/____
Employment Type: [] Full Time [] Part Time [] Contract Average Hours Worked Per Week: _____
Conference: _____ Self Employed: [] Y [] N
Date of Hire: ____/____/____

COMPENSATION/SALARY INFORMATION

Salary Effective Date: ____/____/____
Annual Base Salary: \$ _____
Annual Housing Allowance: \$ _____
Annual Base Salary plus Housing Allowance: \$ _____

Please note: Any changes to salary will be entered on the first day of the month following the Salary Effective Date.

OPTIONAL BENEFIT PLANS

Information about our additional plans is available online. Visit our website at www.pbucc.org and select the Pension & Benefits option.

Please select one or more options:

NOTE: FOR MEDICAL AND DENTAL BENEFITS, DEPENDENT INFORMATION IS REQUIRED – SEE PAGE 3.

☐ **MEDICAL**** ☐ Plan A ☐ Plan B ☐ Plan C ☐ HSA **Effective Date** ____/____/____
☐ UCC Medicare Advantage Plan with Rx

MEDICARE PARTICIPATION

What plan are you enrolled in? Medicare Part A ☐ Yes ☐ No Medicare Part B ☐ Yes ☐ No
What plan is your spouse enrolled in? Medicare Part A ☐ Yes ☐ No Medicare Part B ☐ Yes ☐ No

Note: A copy of your or your spouse's Medicare card(s) must be submitted for enrollment into the UCC Medicare Advantage Plan with Rx.

**Participants may apply for Medical plan coverage within 90 days of date of hire. After 90 days of hire, you are required to complete a Medical Statement of Health form. Please click here https://bit.ly/PB_SOH to download a Statement of Health form. The UCC Medicare Advantage Plan with Rx does not require a Statement of Health form. The completed statement of health form(s) must be returned along with your Annuity Plan Membership and Other Benefit Plans Form.

☐ **DENTAL** ☐ Dental Plan (if Medical coverage is selected) **Effective Date** ____/____/____
☐ Dental Plan Standalone (only if no Medical Coverage is selected)

☐ **LIFE INSURANCE AND DISABILITY INCOME BENEFITS**** **Effective Date** ____/____/____
Is this your **initial** UCC employment in which you are working at least 20 hours per week? ___ Yes or ___ No
☐ Basic Life Insurance ***
☐ Optional Additional Life ***
☐ Optional Additional Dependent Spouse***
☐ Optional Additional Dependent Child***

**Participants applying for Life and Disability Income Benefits after 90 days of initial date of hire, are also required to complete a MetLife Statement of Health form. Please visit https://bit.ly/MET_SOH to download a MetLife Statement of Health form. The completed statement of health form(s) must be returned along with your Annuity Plan Membership and Other Benefit Plans Form.

*** **For Life Insurance and Disability only:** You may click here https://bit.ly/METLIFE_CHANGE to print out the Life Insurance and Disability Income (LIDI) MetLife Enrollment Change Form. The completed MetLife Form needs to be returned along with your Annuity Plan Membership and Other Benefits Form.

☐ **FLEXIBLE SPENDING ACCOUNT (FSA):** New members can enroll within the first 30 days of their employment. Existing members enroll during the open enrollment period at the end of each calendar year for the following year.

Effective Date ____/____/____

☐ I elect Medical Reimbursement ☐ I elect Dependent Reimbursement

Annual Salary reduction: \$_____ Medical \$_____ Dependent
(2022 IRS Max=\$2,850) (2022 IRS Max=\$5,000)

☐ My health coverage is through my spouse's/partner's UCC Health Plan.

Name of spouse/partner and member ID

DEPENDENT INFORMATION FOR INSURANCE: If you are applying for Medical and Dental Benefits, dependent information is required for enrollment.

1. Coverage: ☐ Medical ☐ Dental

Name (last, first, middle initial): _____ Relationship to participant: _____

SSN: _____ Date of Birth: ____ / ____ / ____ Gender: ☐ M ☐ F

2. Coverage: ☐ Medical ☐ Dental

Name (last, first, middle initial): _____ Relationship to participant: _____

SSN: _____ Date of Birth: ____ / ____ / ____ Gender: ☐ M ☐ F

3. Coverage: ☐ Medical ☐ Dental

Name (last, first, middle initial): _____ Relationship to participant: _____

SSN: _____ Date of Birth: ____ / ____ / ____ Gender: ☐ M ☐ F

4. Coverage: ☐ Medical ☐ Dental

Name (last, first, middle initial): _____ Relationship to participant: _____

SSN: _____ Date of Birth: ____ / ____ / ____ Gender: ☐ M ☐ F

☐ Additional Dependent Information for Insurance: Check if applicable, and list information on a separate sheet of paper and attach to this form.

PENSION (EMPLOYER) CONTRIBUTIONS

Please note: Any changes to contribution amounts will be entered on the first day of the month following the Effective Date.

Employer contributions: _____ % or \$ _____ Effective Date: ____ / ____ / ____

EMPLOYEE RETIREMENT CONTRIBUTIONS

Payroll Pre-Tax Salary Reduction**** _____ % or \$ _____ Effective Date: ____ / ____ / ____

Payroll After-Tax Salary Reduction**** _____ % or \$ _____ Effective Date: ____ / ____ / ____

******PAYROLL DEDUCTIONS FREQUENCY**

☐ Monthly (12 paychecks per year) ☐ Twice monthly (24 paychecks per year)
☐ Bi-Weekly (26 paychecks per year) ☐ Weekly (52 paychecks per year)

INVESTMENT ALLOCATIONS*

Information about our funds is available online. Allocation of Future Contributions is 5% increments.

		Sustainable Balanced Fund	Bond Fund	Equity Fund	Stable Value Fund	Global Sustainability Index Fund	TAD Fund 2025	TAD Fund 2030	TAD Fund 2035	TAD Fund 2040	TAD Fund 2045	TAD Fund 2050	Fund percentage must total 100%
1	Employer Contributions	%	%	%	%	%	%	%	%	%	%	%	Total: ____%
2	Employee TSA and After-Tax Contributions	%	%	%	%	%	%	%	%	%	%	%	Total: ____%

Note for new members: Once the pension account is established, you will receive a seven-digit Member ID number included in your enrollment letter. Your Member ID may be used on any correspondence sent to the Pension Boards. It may also be used to access the Member Portal on our website at www.pbucc.org.

*If you do not update allocations above, any contributions made on your behalf will be invested in the Target Annuitization Date (TAD) Fund most appropriate to your anticipated retirement timeline based on your age.

BENEFICIARY INFORMATION:

Beneficiary(ies): I hereby designate the following as Primary or Secondary Beneficiary(ies). If more than one is designated, each surviving Beneficiary shall receive the percentage share indicated. **Total proportion of designations must total 100%.** Please note: If you designate a minor as a beneficiary, you are required to have a probate court-appointed guardian to receive and administer the death benefits to the minor. Do not write the name of the guardian on this form. You must submit a complete copy of the Trust. If you do not elect a beneficiary, your Estate will be the primary beneficiary.

1. SSN: _____ Name (last, first, middle initial): _____

Address Line 1: _____

Address Line 2: _____

Address Line 3: _____ [] Domestic [] Foreign

City _____ State _____ Zip Code _____

Relationship to participant: _____ Date of Birth: ____ / ____ / ____ Gender: [] M [] F

Annuity: [] Primary ____% [] Secondary ____%

2. SSN: _____ Name (last, first, middle initial): _____

Address Line 1: _____

Address Line 2: _____

Address Line 3: _____ [] Domestic [] Foreign

City _____ State _____ Zip Code _____

Relationship to participant: _____ Date of Birth: ____ / ____ / ____ Gender: [] M [] F

Annuity: [] Primary ____% [] Secondary ____%

[] Additional Primary and Secondary Beneficiary(ies): Check if applicable, and list information on a separate sheet of paper and attach to this form.

EMPLOYEE (Member) AGREEMENT

- [] As a member (as defined in the Annuity Plan document), together with my designated Beneficiary or Beneficiaries (as defined in the Annuity Plan document), I acknowledge that the Annuity Plan document is available to me on the **Pension Boards website** (www.pbucc.org) or by clicking here: https://bit.ly/ANNUITY_PLAN. In addition, I acknowledge that I and my Beneficiary shall, always, be subject to the terms and conditions of the Annuity Plan document, as the same may be amended, modified, or supplemented at the sole discretion of The Pension Boards—United Church of Christ, Inc.
- [] I understand: (1) my election regarding elective deferrals is irrevocable once the employer withholds the deferrals from my pay; (2) any changes in elective deferrals are effective only for deferrals from pay I received after the plan administrator accepts my change of election. I understand that the amount of such reduction, pursuant to this election, will be withheld from my pay on a pre-tax and/or after-tax basis, as specified above, and will be paid by my employer into my account in the Annuity Plan; and (3) written notice must be given before the effective date of any modification. This election will remain in effective until I revoke complete a new Employee Pre-Tax Retirement Contribution Agreement.
- [] I have attached a copy of my birth certificate. If I cannot supply a birth certificate, I have attached a copy of my passport or driver's license. **(THIS APPLIES TO FIRST-TIME ANNUITY FUND MEMBERSHIP ENROLLMENTS ONLY.)**
- [] As an eligible employee in the Flexible Benefit Plan for UCC Ministries, I understand that I should review the Highlights of Your Flexible Benefit Plan for UCC Ministries or by clicking here: https://bit.ly/PB_FSA_BKLT to understand the benefits available to me, as well as the other rights and obligations which I have under the plan.
- [] I certify that dependents listed are eligible to enroll in an employer-sponsored health plan. If my status or my dependent's status changes, I agree to notify the Pension Boards immediately.
- [] I have completed the MetLife Enrollment form for Life Insurance and Disability Income Benefits form.

By completing and submitting this form, I hereby apply for membership in the Annuity Plan for the United Church of Christ, in accordance with its Provisions, Rules and Procedures.

Employee (Member) Signature: _____ Date: ____ / ____ / ____

Witness's Signature (not a beneficiary): _____ Date: ____ / ____ / ____
(Required if Participating in the Annuity Benefits Plan.)

SPOUSAL CONSENT

Spousal consent is required if the applicant is married and has not designated their spouse as the sole beneficiary. Please note: A notary is also required if the spouse is signing the form.

Spousal Consent:

[] I hereby consent to the above beneficiary(ies) designated by my spouse.

Spouse's Signature _____ Date: ____ / ____ / ____

NOTARY

(Please note: A notary is only required if the spouse is signing the form.)

Notary's Signature _____ Date: ____ / ____ / ____

Notary's Stamp:

EMPLOYER AGREEMENT

Employer signature is not required for self-pay Medical Benefits.

Employer signature is required if employee or dependent(s) is eligible for UCC Medicare Advantage Plan with Rx Plan. Contributions are to be paid by the employer. If the employer employs less than 20 employees, then a Small Employer Exemption (SEE) form must be completed and submitted with this application to participate in the UCC Medicare Advantage Plan with Rx Plan. Please click here https://bit.ly/PB_SEE_FORM for the Small Employer Exemption form.

Employer signature is required if employee is eligible for UCC Medical Benefits for Non-Medicare eligible, or any insurance benefit offered by PBUCC.

Employers enrolling in Flexible Spending Account Benefits for the **first time only** must visit our website www.pbucc.org or click here: https://bit.ly/FSA_ADOPT to download and complete an Adoption Resolution for the Flexible Benefit Plan for UCC Ministries. The agreement and application must include a \$100 start-up fee.

If you are a new Employer to the Pension Boards, contact the Pension Boards to complete Plan Adoption Agreement.

By signing this form, the Employer, by its duly authorized officer or other representative, hereby agrees to the provisions, rules, and procedures with respect to eligibility and contributions as indicated on this application, and in alignment with the Employer Adoption Agreement.

Employer Name: _____

Employer Address: _____ City _____ State _____ ZIP _____

Signature of authorized officer: _____ Date: ____/____/____

Please return this signed and completed form by email to: info@pbucc.org; by fax: 212.729.2701; or mail to: Pension Boards-UCC, 475 Riverside Drive, Suite 1020, New York, NY 10115.