

New Participant Information for  
The Orthodox Presbyterian Church 403(b) Plan

|  |                                |                               |
|--|--------------------------------|-------------------------------|
| Name (Last, First, Middle Initial)         |                                |                               |
| Home Address (Street, City, State and Zip) |                                |                               |
| Social Security Number                     | Date of Birth (Month/Day/Year) | Date of Hire (Month/Day/Year) |
| Email Address                              | Cell Phone Number              |                               |

|   |
|---|
| Employer (Church) Name                                  |
| Employer (Church) Address (Street, City, State and Zip) |

|           |      |
|-----------|------|
| Signature | Date |
|-----------|------|

By signing above, I am notifying Wipfli LLP of my intent to join The Orthodox Presbyterian Church 403(b) Plan. I understand that if my local church does not yet participate in the above mentioned plan, I must also have a Participation Agreement signed by the church treasurer prior to any contributions to my account.

I understand that submitting this New Participant Information form does not complete by retirement plan beneficiary or investment elections. Within two weeks of submitting this form, I will be contacted to confirm my account has been setup online at <https://retirement.wipfli.com>. Upon this confirmation, I need to login and finish the online enrollment process, electing account beneficiaries and an investment portfolio.