

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	Daytime Phone Number	

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

Signature	Date
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By signing above, I am notifying Creative Planning TPA, LLC 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 Participation Form does not complete my retirement plan beneficiary or investment elections. Within two weeks of submitting this form, I will be contacted to confirm my account has been set up online at <https://www.yourbenefitaccountlogin.net/cpretirement/>. Upon this confirmation, I need to login and finish the online enrollment process, electing account beneficiaries and an investment portfolio.