

Enrollment and Contribution Form

Use this worksheet to submit your employee information and/or any applicable contribution information elections to your employer for enrollment in your CITY OF MARSHALLTOWN)..... at MissionSquare Retirement.

I want to: Start My Journey: Join my CITY OF MARSHALLTOWN).....

1. PERSONAL INFORMATION

PLAN SPONSOR NAME: CITY OF MARSHALLTOWN)..... 705230		
SOCIAL SECURITY NUMBER: FOR TAX REPORTING PURPOSES	DATE OF BIRTH: MM/DD/YYYY	GENDER: <input type="checkbox"/> FEMALE <input type="checkbox"/> MALE <input type="checkbox"/> OTHER
FULL NAME: LAST, FIRST, MI		MARITAL STATUS: <input type="checkbox"/> MARRIED <input type="checkbox"/> SINGLE <input type="checkbox"/> WIDOWED <input type="checkbox"/> DIVORCED
MAILING ADDRESS:		
STREET	CITY	STATE
MOBILE PHONE NUMBER:	EMAIL ADDRESS:	GO PAPERLESS: <input type="checkbox"/>

*Choosing to go paperless means you are asking your employer to opt you into electronic communications to the email address you have designated.

2. INVESTMENT SELECTION

By submitting this form, you understand you are authorizing your plan sponsor to enroll you in the plan without elections. Once your enrollment is processed you may log in to the participant website or mobile app to select your investments. If you do not select an investment option, your entire account will be invested in the Plan's default investment selection.

3. BENEFICIARY DESIGNATION

Once your enrollment is processed you may log in to the participant website or mobile app to enter your beneficiary information.

AMOUNT OF PAYROLL DEDUCTION:

Until further notice is provided to my employer, I authorize my employer to deduct \$ _____ from my salary each pay period.

2026 IRA contribution limit - \$7,500 (\$1,100 if age 50 or older)

4. SIGNATURES (SIGN, DATE, AND SUBMIT THE COMPLETED FORM TO YOUR PLAN SPONSOR)

Employee Signature: _____ Date: MM/DD/YYYY _____

Authorized Plan Sponsor Official's Signature: _____ Date: MM/DD/YYYY _____

Authorized Plan Sponsor Official's Name and Title: _____ Date: MM/DD/YYYY _____

SUBMIT THE COMPLETED WORKSHEET TO YOUR PLAN SPONSOR. RETAIN A COPY FOR YOUR RECORDS.

For Plan Sponsor Use Only:

Employee ID: _____ Hire Date: MM/DD/YYYY _____

Rehired? Check if Yes

Rehire Date: MM/DD/YYYY _____ Original Hire Date: MM/DD/YYYY _____ Leave Date: MM/DD/YYYY _____