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 wesleyanpensionfund.com

PARTICIPANT ENROLLMENT FORM

I have read the appropriate materials and direct Wesleyan Pension Fund to place my future contributions into the investment choices in the percentages indicated. This form is intended for enrolling in the plan only. (Three pages total.)

A. PERSONAL INFORMATION

Last Name _____ First Name _____ Middle Initial _____
 Social Security # _____ Male Female Date of Hire (MM/DD/YYYY) _____
 Home Address _____
 City _____ State _____ Zip Code _____
 Date of Birth (MM/DD/YYYY) _____ Spouse Date of Birth (MM/DD/YYYY) _____
 Check Box: Ordained/Licensed Minister Lay Person Primary Phone _____
 Employer _____ District _____ Work Phone _____
 Email Address _____

B. INVESTMENT OPTIONS

OPTION 1: DO IT FOR ME

Wesleyan Target Retirement Date Portfolios—the Fastest and Easiest Way to Start Saving Now!

- I understand contributions will be directed within the Wesleyan Target Retirement Date Portfolio based on my expected retirement age or as defined by my employer’s retirement plan if no age is entered in the Personal Information section.
- Your investment election will be effective when it is received in our Corporate Center.
- If no investment election is received, or contributions are received prior to your investment election, contributions will be deposited per the direction of your employer.
- All of your contributions made to this plan, including rollover contributions, will be invested using the percentages listed in this document. You may transfer your contributions or change investment election as allowed by the plan.

OPTION 2: CUSTOMIZED CHOICES

Select ONE Portfolio Option or any combination of Single Fund Options and ONE Portfolio Option to equal 100%

TARGET RETIREMENT DATE PORTFOLIO OPTIONS (1)

Wesleyan Retirement Portfolio	_____%
Wesleyan 2020 Portfolio	_____%
Wesleyan 2025 Portfolio	_____%
Wesleyan 2030 Portfolio	_____%
Wesleyan 2035 Portfolio	_____%
Wesleyan 2040 Portfolio	_____%
Wesleyan 2045 Portfolio	_____%
Wesleyan 2050 Portfolio	_____%
Wesleyan 2055 Portfolio	_____%

SINGLE FUND INVESTMENT OPTIONS (ANY)

American Funds New World Fund	_____%
American Funds Washington Mutual Investors Fd	_____%
GuideStone Medium-Duration Bond Fund	_____%
MassMutual Select Mid Cap Growth Equity Fund II	_____%
Metropolitan West Total Return Bond	_____%
Oakmark International Fund	_____%
PIMCO Income Fund/Administrative	_____%
Principal Large Cap S&P 500 Index	_____%
Principal MidCap S&P 400 Index	_____%
Principal Small Cap Fund	_____%
Principal Real Estate Securities Fund	_____%
Steward Large Cap Enhanced Index Fund	_____%
T. Rowe Price Blue Chip Growth Fund	_____%
Wells Fargo Advantage Special Mid Cap Value Fd	_____%
Wesleyan Investment Foundation	_____%

C. VOLUNTARY SALARY REDUCTION

Employee Contributions

Defer \$_____ or _____% per month of my current and future salary. This agreement applies to amounts earned until changed by me in writing. I understand my plan sponsor may reduce my deferral only when required to meet certain plan limits.

The current dollar limit for Voluntary Salary Reductions is \$19,000. If you are over age 50, an additional \$6,000 may be contributed for a total of \$25,000. Please contact your tax advisor for advice. These limits may change each calendar year. The Treasurer/Employer signature is required only if you participate in this option.

X

Treasurer/Employer
(Required only for voluntary salary reductions)

Date

D. BENEFICIARY FORM

See page 3

The attached Beneficiary form must be completed (including signature and date) and accompanied with your Enrollment form.

Beneficiary Forms are also available on our website: wesleyanpensionfund.com

E. SIGNATURE

Please sign and date indicating your agreement and completion of these enrollment forms (three pages).

X

Participant Signature

Date

To help ensure you receive accurate reports that reflect the correct investment of your plan's contributions, please review all reports regularly and report any discrepancy to us immediately. *Also, please keep us updated with any address or name changes—if you terminate employment, your pension will still be active and available for your retirement.*

After you have completed this form, please mail it to Wesleyan Pension Fund Inc at the address above. A letter will be sent to you with instructions on how to access your online account information and a confirmation of your election will be shown in your semi-annual report. If you have questions or need assistance, please contact us. If you do not elect any of the investment choices above, your contributions will be allocated to the Moderate Option. You may change your allocation at any time.

Serving HIM for your benefit!



Investment options in the plan are not insured nor guaranteed by Wesleyan Pension Fund Inc, any bank, the Federal Deposit Insurance Corporation or any other government agency. Investment in the funds involves investment risk, including the possible loss of the principal amount invested. The funds have not been approved or disapproved by the Securities Exchange Commission or any state regulatory authority. Please order and read the fund's prospectus very carefully before investing.



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BENEFICIARY FORM

PARTICIPANT

Please print or type

Last Name First Name Middle Initial
Social Security # Date of Birth
Home Address
City State Zip Code
Email

BENEFICIARY DESIGNATION

PRIMARY BENEFICIARY

Individual/Trust Relationship
Social Security # Date of Birth
Address (if not the same as above)
City State Zip Code

BENEFICIARY DESIGNATION

CONTINGENT BENEFICIARY

Name Relationship
Social Security # Date of Birth
Address
Name Relationship
Social Security # Date of Birth
Address
Name Relationship
Social Security # Date of Birth
Address
Name Relationship
Social Security # Date of Birth
Address

X

Participant Signature

Date