

EZ Enrollment Form



Personal information (please print)

Last name _____ First _____ M.I. _____

Address _____

City _____ State _____ Zip _____

Email _____

Work phone _____ Personal phone _____

Birth Date (mm/dd/yyyy) _____ Male Female

Pension system: OPERS STRS SERS OP&F HPRS
 CINCY OTHER

I currently have other tax-deferred retirement assets in (check any that apply):

457 401(k) 401(a) 403(b) Traditional IRA None

Employer name _____

Department _____ Pay days per year _____

Social Security number (required)

I acknowledge I have read the terms and conditions.

Signature _____ Date (mm/dd/yyyy) _____

Make your choice

I would like to invest in my future by enrolling in the Ohio Deferred Compensation saving plan today and begin contributing per pay period:
 \$50 \$100 Other: \$ _____

A pre-tax deduction will be invested in a LifePath Portfolio closest to the year I turn 65. My payroll deductions will begin on the next pay period following 30 days from the date my form is received by Ohio DC.

You will be enrolled in the SMarT plan to automatically increase your deferrals each January by \$10 per pay or \$_____ per pay. Check the box to decline the benefits of the SMarT plan.

You will be notified when your Quarterly Statements and Focus newsletters are available at Ohio457.org. If you prefer to receive your statements and newsletters by regular mail, please check the box.

TURN IN TODAY!

Fax: **614-222-9457**

Mail: Ohio Deferred Compensation
257 East Town Street, Suite 457
Columbus, Ohio 43215-4626

TERMS AND CONDITIONS

Upon enrolling, you will be mailed a Welcome Kit that includes the Cancellation Form, Beneficiary Form, Memorandum of Understanding, and Plan Document with more detailed information on the terms and conditions outlined below:

- Your account balance will be held by Ohio Deferred Compensation in trust on behalf of your employer for the exclusive benefit of you or your beneficiaries.
- You can cancel your participation before your forms are processed by calling 877-644-6457 within seven days of the date signed on this form.
- Based on market fluctuations, the rate of return on your account could be either positive or negative. This could result in your account balance being worth less than your contributions.
- Investments have underlying expenses or management fees that will reduce the investment results. Information on these expenses can be found in the fund profiles or the respective prospectus. Call 877-644-6457 to receive the fund profile or prospectus.
- Before investing, carefully consider the fund's investment objectives, risks, charges, and expenses. The fund prospectus or profile contains this and other important information. Read the prospectus or profile carefully before investing.
- At any time, you may change the amount you defer or the allocation of future investment options.
- The Internal Revenue Service imposes rules that limit the times you can make changes or receive withdrawals from the Program.

- You may withdraw funds from the Program only upon:
 - Ending your employment (including termination, retirement, or death)
 - An Unforeseeable Emergency (as defined by Section 457 of the IRC)
 - Small Balance Distribution (see Plan Document for eligibility)
- An Unforeseeable Emergency is defined by the IRS as a severe financial hardship. Please see the Program Plan Document for specific details. Purchasing a home, credit card debt, and sending your children to college are not qualifying events.
- Withdrawals may begin after ending your employment and the Program's receipt of your employer's verification that employment ended, final deferral, and the Withdrawal Election form.
- Distributions must satisfy certain minimum requirements upon attaining age 70 1/2.
- The funds in your account may be eligible for rollover to a traditional IRA or to an eligible retirement plan upon ending your employment.
- Your participation in Ohio DC is for long-term retirement savings. You should maintain separate, available emergency funds to cover day-to-day, unanticipated, financial shortages.

Remember, there are no guarantees. Investing involves risk, including possible loss of principal.

Account Executives are registered representatives of Nationwide Investment Services Corporation, Member FINRA.