FINANCIAL SOLUTIONS℠

MBA TRADITIONAL (NOT ROTH) AFTER-TAX CONTRIBUTION FORM & EMPLOYER CERTIFICATION

To be used when personal funds are used to make contributions on a traditional after-tax basis only and not coming in on a church check

NOTE: Your employer's written plan must allow for traditional after-tax contributions in order to participate in this manner.

1 General Member Information

Full Name ____
Last First Middle Initial

Daytime Phone ☐☐☐ - ☐☐☐ - ☐☐☐☐ SS # ☐☐☐ - ☐☐ - ☐☐☐☐

2 Employer Information

If you're an evangelist, independent contractor minister, or chaplain complete sections 4 & 5; leave 2 & 3 blank.

Employer Name ____
Last First Middle Initial

Mailing Address ____
Street or PO Box City State Zip

Work Phone ☐☐☐ - ☐☐☐ - ☐☐☐☐ E-mail Address ______________________________

3 Employer Certification & Signature

I hereby certify that our written plan provisions allow for after-tax provisions and that ____________________________ (employee name) can make this traditional (not Roth) after-tax contribution. They will not be exceeding their contribution limits for this year as outlined by the Internal Revenue Service (visit our Web site for contribution limits). *This form must be renewed annually if the member is doing electronic transfers (EFT), otherwise it must accompany every contribution made on an after-tax basis by check or internal transfer.*

Authorized Employer Signature ____ **Date** ______________
Member cannot sign as both the member and the employer

Printed name ____ **Title** ________________________________

4 One-time Deposit Amount by Check or Internal Transfer

Please deposit $_____________________ in my MBA 403(b) retirement account as a traditional after-tax contribution.

- ☐ per the enclosed payment
- ☐ per transfer of funds from my MBA Personal Savings account #_____________________
- ☐ per transfer of funds from my AGLF 30-day Demand Note Certificate #_____________________

In order to set up a monthly deposit by EFT, please skip to Section 6. By opting to do EFT this form will only need to be completed on an annual basis instead of each time a payment is made by check or internal transfer.

5 For Evangelists and Other Independent Contractor Ministers & Chaplains (403(b) contributions can only be based on ministry compensation)

For Evangelists & Other Independent Contractor Ministers Only

*By initialing here, I am certifying that I am an independent contractor for ministry purposes, am not employed by any ministry, and I qualify to file a Schedule C for my federal income tax on my ministry income. [This is not for those who file as self-employed for SECA purposes only.] IRS Example: A church hires and pays you a salary to perform ministerial services subject to its control; under common-law rules, you are an employee of the church while performing those services. Please call our Customer Care Services or visit our Web site for further clarifications on independent contractor status*______________________________
MEMBER SIGNATURE

For Chaplains

*By initialing here, I am certifying that I am an AG credentialed minister who is employed in ministry by an organization which is NOT an AG employing unit such as an AG church, district council, school (grades k-12), The General Council, or a 501(c)(3) organization which is controlled by or associated with the Assemblies of God, AG church, district council, or an association of AG churches or district councils and is providing services to that organization in connection with the exercise of their ministry. Please call our Customer Care Services or visit our Web site for further clarifications on independent contractor status*________________________
MEMBER SIGNATURE

6 Signatures and Authorization Agreement for monthly EFT

I hereby authorize Assemblies of God Ministers Benefit Association to initiate debit entries and to initiate, if necessary, credit entries and adjustments for any debit entries in error, to my checking account indicated and further authorize said bank to credit and/or debit the same to such account. This authority is to remain in full force and effect until Ministers Benefit Association has received notification from me of its termination in such time and in such manner as to afford MBA and my bank a reasonable opportunity to act on it.

Please deposit $____________________ in my MBA 403(b) retirement account as a traditional after-tax contribution.

By electronic transfer on the ❑ 10th or ❑ 20th of the month beginning in ________________________
MONTH YEAR

Please indicate if this is a new or change in Electronic Funds Transfer (EFT) information

❑ This is a **new** Authorization for EFT to my MBA 403(b) Retirement Account by electronic funds transfer
❑ This is a **change** Authorization for EFT to my MBA 403(b) Retirement Account by electronic funds transfer

Member's Signature ______________________________________ **Date** __________________

Voided check MUST be attached here for EFT

- All changes should be received by MBA seven working days prior to the 10th or 20th.
- If contributions are rejected because of insufficient funds in your bank account for two consecutive months or three times within 12 months, you will be taken off automatic withdrawals.
- In the event of a stop payment of a draft or a closing of your bank account without prior notification to MBA, we may revoke this authorization agreement.

MBA Retirement
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