



403(b) Traditional After-Tax Contribution Form & Employer Certification

To be used when 403(b) contributions are made on a traditional after-tax basis (not Roth) and funds are remitted from a personal account.

NOTE: Your employer's written plan must allow for traditional after-tax contributions in order to participate in this manner. Distributions made from these traditional after-tax funds within one year of the contribution will be assessed a \$250.00 fee.

① Participant Information

Full Name _____
Last First Middle Initial
SSN _____ Phone # _____

② Employer Information

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

Employer Name _____
Mailing Address _____
Street or PO Box City State Zip
Work Phone _____ Email Address _____

③ Assemblies of God Employer Certification & Signature

I hereby certify that our existing written plan provisions (including any recent amendment) allow for traditional after-tax contributions 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 website for contribution limits). This ministry will promptly notify AG Financial when this employee is no longer eligible to make this after-tax contribution. *This form must be renewed annually if the participant is making automatic contributions; otherwise it must accompany every contribution made on an after-tax basis with personal funds or by an internal transfer from an AG Financial account.*

Authorized Employer Signature _____ Date _____
Participant cannot sign as the employer
Printed name _____ Title _____
Employer Name, City, State _____

④ One-time Deposit Amount by Check or Internal Transfer

Deposit \$ _____ in my 403(b) retirement account as a traditional after-tax contribution.
 per the enclosed payment
 per transfer of funds from my AGLF Demand Certificate # _____

To set up automatic monthly deposits, please complete Section 6. By opting to make automatic deposits, this form will need to be completed on an annual basis instead of each time a payment is made by personal check, AG Financial account internal transfer, or by other personal funds. AG Financial is not responsible for monitoring the annual renewal of the automatic deposit form.

⑤ For Evangelists and Independent Contractor Ministers & Chaplains

(403(b) contributions can only be based on ministry compensation)

Please contact Client Services or visit our website for further clarification on independent contractor or chaplain status.

For Evangelists & Other Independent Contractor Ministers Only

By signing here, I certify that I am earning income as an independent contractor as a minister, am not employed by any ministry, have includible compensation for this contribution, and I receive a form 1099-MISC and/or 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.] I will promptly notify AG Financial when I am no longer eligible to make this after-tax contribution.

Signature

For Chaplains and Other AG Credentialed Ministers Employed in Ministry by non-Assemblies of God Employers

By signing here, I certify that I am an AG credentialed minister who is employed as a minister 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 my ministry. I will promptly notify AG Financial when I am no longer eligible to make this after-tax contribution. I certify I have includible compensation for this contribution.

Signature

⑥ Signature and Authorization Agreement for Automatic Deposits

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 bank 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 automatically deposit \$_____ in my 403(b) retirement account as a traditional after-tax contribution

on the 10th or 20th of the month beginning in _____
Month Year

Please indicate if this is a new authorization or a change in your current Automatic Deposit information:

- This is a **new** authorization for contributions to be automatically deposited into my 403(b) Retirement Account.
- This is a **change** from my current authorization for contributions to be automatically deposited into my 403(b) Retirement Account.

Signature _____ Date _____

Voided check MUST be attached here

Do not attach deposit slip

- All changes should be received by AG Financial seven working days prior to the 10th or 20th of the month.
- If contributions are rejected because of insufficient funds in your bank account for two consecutive months or three times within 12 months, automatic deposits will cease.
- In the event of a stop payment of a draft or a closing of your bank account without prior notification to AG Financial, we may revoke this authorization agreement.
- If the participant's ministry employment and/or ministry compensation changes, you must change or stop the automatic deposits as appropriate.