

Quick Enrollment Program

What are you waiting for? Learn what many of your co-workers already know, [saving for retirement is as easy as ASC!](#) The "Quick Enrollment Program" is a time saving way to begin your participation in your employer's retirement plan. Once in, you have complete control to change your elections, investment choices, and beneficiaries.

Paycheck Deduction



I want to save

_____ % \$ _____

Per Paycheck.

Default Investment



Invest my money in the

Select Target Date Fund

listed on back of this form.

General Information

Employer / Plan Name

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Your Name (Last Name, First Name, Middle Initial)

Social Security Number

Mailing Address

City

State

ZIP

E-mail Address *(used to receive notifications about your account, including quarterly statements)*

HOME Phone

CELLULAR Phone

WORK Phone

OTHER Phone

Date of Birth (mm/dd/yyyy)

Date of Hire (mm/dd/yyyy)

Marital Status: Not Married Married* - Spouse Name: _____

Beneficiary Designation

The space below is a simple beneficiary form, designed for your primary beneficiary(s). If you have more complex beneficiary requirements, please complete the beneficiary form found in the [Comprehensive Enrollment Form](#) for the plan.

Full Name

Date of Birth

Social Security No.

Relationship to You

Share %

Full Name

Date of Birth

Social Security No.

Relationship to You

Share %

Certification: By signing below, I acknowledge that my investments will default to the TDP Profile appropriate for my age. If I want to contribute a different amount or make a different investment selection, I understand that I can do so at any time in the future by completing a comprehensive enrollment form or by going online and changing my elections. Further, I acknowledge I had the opportunity to review the Summary Plan Description and investment information and that I understand the provisions of the employer's retirement plan. Please see the back of this form for more detail.

Signature of Participant

Date

Authorized Plan Administrator

Date

Select Target Date Profiles (TDP)

Retirement will take place over multiple decades for the average participant. Unlike a home purchase or college tuition dues, not all funds will be needed on the first day of retirement.

Since the need for funds and liquidity will be over an extended period of time for most retirees, it is not necessary for all funds to be invested with the same amount of risk.

The ASC Select Target Date Series Profile Trust Funds (TDP) solves this issue by allowing participants to view their holdings within six spending periods "Buckets" consisting of 0-5 years, 6-10 years, 11-15 years, 16-20 years, 21-25 years and 25+ years. The key to time segmentation is that the next time a bear market occurs, participants can view their account as multiple accounts based on when they will need to access their funds. Having access to multiple accounts gives those riskier investments the time they need to potentially grow.

The ASC Select Target Date Series Profile Trust Funds (TDP) are created for the participant who understands that they need to participate in a retirement plan, but they neither have the time nor desire to manage their investments. Each fund in the series invests in a portfolio of equity, fixed income, and short term securities, and is reallocated over time to become more conservative as the fund approaches its target year.

The target date represents the year in which investors may likely begin withdrawing assets. Each fund gradually seeks to reduce market risk as the target date approaches and after it arrives, by decreasing equity exposure and increasing fixed income exposure.

Each fund is a hybrid strategy allocated 50% to passively managed Vanguard Funds and 50% to actively managed American Funds. Likewise, the underlying glide slope allocation is a mirror allocation of Vanguard and American Funds Target Date funds. The funds' glide slope path, as well as the fund allocation percentages are effective January 1, 2017, and are subject to the ASC Investment Committee overview, as well as both American Funds and Vanguard Funds management discretion. Further, each fund will evolve over time as the specific fund nears its target date.

DEFAULT INVESTMENT BY AGE		
Year of Birth	Years to Retirement	Target Date Profile
-1949	In Retirement	Select TDP 2010
1950-1954	In Retirement	Select TDP 2015
1955-1959	5	Select TDP 2020
1960-1964	10	Select TDP 2025
1965-1969	15	Select TDP 2030
1970-1974	20	Select TDP 2035
1975-1979	25	Select TDP 2040
1980-1984	30	Select TDP 2045
1985-1989	35	Select TDP 2050
1990-1994	40	Select TDP 2055
1995+	45	Select TDP 2060

- Not FDIC Insured • No Guarantee • May Lose Value •

For additional information on ASC's Services, please refer to our website

www.ASCTrust.com

