

Employee Application for Membership The Episcopal Church Lay Employees' Retirement Plan (Lay DB Plan)

Section 1: Employee Information and Marital Status

All information must be provided. Indicate where not applicable with N/A.

Legal Name

First MI Last

Mailing Address

Street

City State ZIP Country

Home Phone Mobile Phone

Email

Social Security # Date of Birth*

Gender ☐ Male ☐ Female Marital Status ☐ Single ☐ Married

Spouse's Legal Name

First MI Last

Gender ☐ Male ☐ Female

Social Security #/TIN # Date of Birth

Date of Marriage

Section 2: Employment Information

All information must be provided. Indicate where not applicable with N/A.

Employer Name

Mailing/Billing Address

Street

City State ZIP

Employee's Title Hire Date

Hours expected to work per year Enrollment Effective Date

Section 3: Compensation

Other than a one-time payment, list all amounts on an **annual basis**.

\$ _____
Base salary (excluding housing) and
scheduled taxable cash payments

\$ _____
Cash housing allowance and/or
utilities

\$ _____
Employer contributions to a qualified
or non-qualified plan

\$ _____
One-time payments

Employer-provided housing?

☐ Yes ☐ No

(Check "Yes" if the employer provides
physical housing for the employee)

Send assessment bills to: ☐ Employer ☐ Diocese

Section 4: Employee's Signature

Employee's Signature	Date
Print Name	Title
Email	

Submit the completed and signed form to your employer.

Employer: Complete this transaction in My Admin Portal (MAP).

For Employer Recordkeeping Purposes Only

This material is provided for informational purposes only and should not be viewed as investment, tax, or other advice. It does not constitute a contract or an offer for any products or services. In the event of a conflict between this material and the official plan documents or insurance policies, any official plan documents or insurance policies will govern. The Church Pension Fund ("CPF") and its affiliates (collectively, "CPG") retain the right to amend, terminate, or modify the terms of any benefit plan and/or insurance policy described in this material at any time, for any reason, and, unless otherwise required by applicable law, without notice.

The Lay DB Plan's financial condition is disclosed in the Church Pension Group Annual Report, which is located on our website at www.cpg.org. Like many defined benefit plans, there may be times when the Lay DB Plan is not fully funded. CPF, as sponsor of the Lay DB Plan, continues to monitor the plan's funding status and reserves the right to change the employer assessment rate at any time.