

Happy Birthday!



Unfortunately,
birthday wishes
won't help your
savings grow,
but we can!

Learn more about how Vista 401(k) can help!



Visit
VISTA401K.COM



Call
(866) 325-1278


WANT TO INVEST IN A VISTA 401(K) SUPPLEMENTAL RETIREMENT PLAN?

Quick Enroll

1. Complete the fillable enrollment form on the next page
2. Save the completed form to your desktop
3. Visit <https://forms.myfbmc.com/Forms/Vista401k> & provide the requested information.
4. Attach your completed application & choose submit

 **Visit** [Vista401k.com](https://forms.myfbmc.com/Forms/Vista401k), select "My Account Login", and follow the prompts.

-OR- Complete the fillable form & return it to the **Retirement Services Dept.** via:

 **Mail:** PO Box 1878,
Tallahassee, FL 32302-1878

 **Fax:** (850) 425-8345

The Vista 401(k) Plan is one of your school district sponsored supplemental retirement plans.

VISTA
401(k)



401(k) Short Enrollment Form

(Please complete all portions of this form)

1 EMPLOYEE INFORMATION

LAST NAME	FIRST NAME	MI	SSN -OR- EMPLOYEE ID #	DOB	
ADDRESS			CITY	STATE	ZIP
EMAIL			PHONE		

2 CONTRIBUTIONS

Amount Per Pay Period – Full-Time Employee Only (\$ -OR- %). Amount Per Pay Period – Part-Time Employees (% Only) _____

(NOTE: The minimum annual contribution is \$500.)

Payroll Code (If applicable): _____ || # of Pay Periods per Year _____ || Annual Automatic Increase by % _____

➔ Indicate above the per pay period amount or percentage you wish to contribute to your 401(k) Plan. Also indicate, using percentage, if you would like to automatically increase your contribution on a yearly basis. The Minimum annual contribution amount is \$500.

3 INVESTMENT ELECTIONS

To determine how future contributions will be allocated in your plan by using the chart below and following these instructions:

- Determine the percentage on the line next to the investment options of your choice which represents the percentage of your contributions you would like in this investment option.
- Review your percentages to ensure they total 100%. If the percentages do not total 100%, your request will not be accepted.

➔ For more information about any of the funds listed below, please refer to the **Fund Prospectus** at Vista401k.com/401k-funds/

American Century Inflation-Adjusted Bond	_____ %
American Funds Target Date Fund 2020	_____ %
American Funds Target Date Fund 2025	_____ %
American Funds Target Date Fund 2030	_____ %
American Funds Target Date Fund 2035	_____ %
American Funds Target Date Fund 2040	_____ %
American Funds Target Date Fund 2045	_____ %
American Funds Target Date Fund 2050	_____ %
American Funds Target Date Fund 2055	_____ %
American Funds Target Date Fund 2060	_____ %
American Funds Target Date Fund 2065	_____ %

American Funds EuroPacific Growth	_____ %
Fidelity International Index	_____ %
JP Morgan Equity Income Fund	_____ %
Lord Abbett Total Return	_____ %
JP Morgan Large Cap Growth Fund	_____ %
Standard Insurance Guaranteed FI VI	_____ %
Vanguard Balanced Index	_____ %
Vanguard Institutional Index Fund	_____ %
Vanguard Mid-Cap Index Fund	_____ %
Vanguard Small-Cap Index Fund	_____ %

TOTAL (MUST equal 100% in whole numbers) _____ %

4 INVESTMENT ELECTIONS

This agreement shall be legally binding and irrevocable as to both of the parties hereto while employment continues; provided, however that either party may change or terminate this agreement by giving notice in writing and in accordance with Board procedures, rules and prescribed methods concerning said changes or terminations.

That except as herein set forth, the contract of employment of the Employee is not otherwise amended and shall remain in full force and effect. It is agreed and understood that the School Board and Vista 401(k) undertake no obligation by making available a salary reduction agreement through payroll deduction to make contributions to any Section 401(k) Tax Sheltered Investment Plan. You have selected your own investments from the Funds listed above (Section 4) and the School Board or Vista 401(k) has no responsibility for investment results.

I understand and agree that my employer, union and Vista 401(k) will be held harmless from any liability resulting from either my participation in the Vista 401(k) Plan or my failure to accurately complete this enrollment form. I understand that my contributions are not subject to federal income tax until distribution from the Vista 401(k) Plan but the contributions are subject to Social Security taxes.

SIGNATURE: _____

DATE: _____