



# Rollover Contribution Account (RCA) Agreement Form

**MEMBER ID:** \_\_\_\_\_

This application communicates the desire for annuitized members to establish an Annuity Plan Rollover Contribution (RCA) for non-annuitized members. You are 100% vested in the funds within the RCA. Deposits to your RCA account will not be available for withdrawal until 40 days following the receipt of the deposit.

## PERSONAL INFORMATION

SSN: \_\_\_\_\_ Date of Birth: \_\_\_/\_\_\_/\_\_\_ Gender: [ ] M [ ] F Title: [ ] Rev. [ ] Dr.

Relationship Status: [ ] Single [ ] Married [ ] Divorced [ ] Widowed [ ] Civil [ ] Domestic Partnership

Member (last, first, middle initial): \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Home Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Email: \_\_\_\_\_

## FUND ALLOCATION DIRECTIONS

Allocate accumulation balances using 5% increments below.

Sustainable Balanced Fund	Bond Fund	Equity Fund	Stable Value Fund	Global Sustainability Index Fund	TAD Fund 2025	TAD Fund 2030	TAD Fund 2035	TAD Fund 2040	TAD Fund 2045	TAD Fund 2050	Fund percentage must total 100%
%	%	%	%	%	%	%	%	%	%	%	Total: _____%

## BENEFICIARY PERSONAL INFORMATION

If you are currently a participant of the Annuity Plan for United Church of Christ, your designated beneficiaries will apply to this account and benefits. If this is your first time participating in Annuity Plan for United Church of Christ, you may add beneficiaries to your account after you have been issued a Member ID number.

If you wish to update your beneficiaries, you must complete a Beneficiary Designation form, which may be found on our website at [www.pbucc.org](http://www.pbucc.org).

## SIGNATURE

Signature of person entitled to designate a beneficiary: \_\_\_\_\_ Date: \_\_\_/\_\_\_/\_\_\_

Signature of witness (not a beneficiary): \_\_\_\_\_ Date: \_\_\_/\_\_\_/\_\_\_

Please return this signed and completed form by email to: [info@pbucc.org](mailto:info@pbucc.org); by fax: 212.729.2701; or mail to: Pension Boards-UCC, 475 Riverside Drive, Suite 1020, New York, NY 10115.