

THE ROMAN CATHOLIC  
**ARCHDIOCESE OF ATLANTA**



OFFICE OF HUMAN RESOURCES

Lily Gallagher  
(404) 920-7485  
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RE: Roman Catholic Archdiocese of Atlanta formerly known as  
Archdiocese of Atlanta Retirement Income Church  
403(b)(9) Custodial Account Plan

Dear Employee:

All employees of the Archdiocese of Atlanta are eligible to participate in the 403(b) Plan, administered by MassMutual.

Please invest a few minutes to learn about the basics of the plan. The Plan Enrollment Book may be found at:

<http://www.archatl.com/offices/human-resources/insurance-information/>

To proceed with setting up your MassMutual 403(b) account, please send your completed enrollment paperwork to:

Fay Duhe'  
Senior Benefits Specialist  
Archdiocese of Atlanta  
2401 Lake Park Dr., SE  
Smyrna, GA 30080-8862

If you have questions, or wish to request a printed copy of the Plan Enrollment Book or of the Prospectus, please feel free to contact me. God Bless.

Sincerely,

A handwritten signature in cursive script that reads "Lily Gallagher".

Lily Gallagher  
Benefits Manager  
Archdiocese of Atlanta

# ARCHDIOCESE OF ATLANTA

## *403(b) ENROLLMENT CHECKLIST*

Additional 403(b) information can be found on the Archdiocese of Atlanta website:  
<https://archatl.com/offices/human-resources/insurance-information/>

- Complete **MassMutual Enrollment Record** (page 3-4 enrollment booklet)
  - a. “Employee Information” Section
    - Include SSN, **Work Location (critical for payroll purposes)**, Name, Phone No., Mailing Address, City, State, Zip, DOB, Sex, Date of Hire, & Date of Eligibility (same as date of hire)
  - b. “Contribution Elections” (Elective Deferrals)
    - Include a percentage **or** dollar of compensation you would like to be withheld each payroll period on a before-tax basis, or as a Roth (after-tax) contribution.
    - Contribution amount cannot exceed 65%
  - c. “Investment Election” (Complete section 1 **OR** 2)
    - **Section 1**– Selections must be in whole percentages totaling 100%
    - **Section 2** – Model My Goals Asset Allocation Model Program  
*\*\* If you would like to take advantage of the Asset Allocation Model Program that systematically reallocates your money each quarter: **Leave Section 1 blank and select a portfolio for your account**\*\**
  - d. “Signatures”
    - Complete the *Signed in the State of, Date, and sign as Participant.*
  
- Complete **MassMutual Beneficiary Designation Form** (page 5 enrollment booklet). Please use whole percentages for each beneficiary. A primary beneficiary is the first person designated to receive any benefits if you die. The contingent beneficiary is an individual who is entitled to receive the benefits of your retirement if the primary beneficiary dies. ***Please make sure you sign and date the form at the bottom.***

### PLEASE SEND THE ENROLLMENT RECORD AND BENEFICIARY FORM TO:

**Fay Duhe’, Senior Benefits Specialist**  
Archdiocese of Atlanta  
2401 Lake Park Drive S.E.  
Smyrna, GA 30080-8862  
Office: (404) 920-7484 ▪ Fax: (404) 920-7481  
Email: [fduhe@archatl.com](mailto:fduhe@archatl.com)

**ROLLING OVER MONEY YOU HAVE IN ANOTHER RETIREMENT PLAN TO MASSMUTAL (Including IRA’s, 403(b)’s, etc.).** Please contact MassMutual at 1-800-528-9009, 8 a.m. to 8 p.m. ET Mon.-Fri. An authorized signature from Lily Gallagher, Benefits Manager is required on the form to confirm your eligibility and employment status.

**Roman Catholic Archdiocese of Atlanta  
formerly known as  
Archdiocese of Atlanta Retirement Income Church  
403(b)(9) Custodial Account Plan**

The Roman Catholic Archdiocese of Atlanta is pleased to offer our employees the 403(b) retirement plan as a benefit to help save and invest for retirement.

All employees are eligible to participate in the 403(b) Plan,  
administered by MassMutual Financial Group.

Please invest a few minutes to learn about the basics of the plan.

The Plan Enrollment Book may be found at:

<https://archatl.com/offices/human-resources/insurance-information/>

