

THE ROMAN CATHOLIC
ARCHDIOCESE OF ATLANTA



OFFICE OF HUMAN RESOURCES

Lily Gallagher
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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 Empower Retirement.

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 Empower 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
EMPOWER / MASS MUTUAL RETIREMENT
403(b) ENROLLMENT CHECKLIST

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

- Complete **Enrollment Record** (Found in 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”
 - Include the percentage of compensation you would like to be withheld from each payroll period on a pre-tax basis, or as a Roth (after-tax) contribution.
 - c. “Investment Election” (Complete section 1 **OR** section 2)
 - **Section 1** – Selections must be in whole percentages totaling 100% allocated from each pay period to the individual mutual fund.
*** If you would like to take advantage of the Asset Allocation Model My Goals in Section 2 that systematically reallocates your money each quarter: Leave Section 1 blank and continue to Section 2. ****
 - **Section 2** – Model My Goals. Select the portfolio for your account.
 - d. “Signatures”
 - Complete the *Signed in the State of, Date,* and sign as *Participant*.

- Complete **Beneficiary Designation Form** (Found in the 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 FORM (2 pages) AND BENEFICIARY FORM (1 page) 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

IF YOU WISH TO ROLLOVER OR/TRANSFER/EXCHANGE-IN ASSETS FROM A FINANCIAL INSTITUTION (Including IRA’s, 403(b)’s, etc.) TO YOUR ARCHDIOCESE 403(b) ACCOUNT, please contact Empower / Mass Mutual Retirement at 1-800-528-9009, 8 a.m. to 8 p.m. ET Mon. – Fri.

If you have questions regarding investment options or the funds available, please take 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/>

**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 Empower Retirement (formerly known as Mass Mutual)

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/>

