

Appleton Area School District Employee Savings Plan

PI InterLink Election Form

1: EMPLOYEE INFORMATION

Complete this form to enroll in your company's retirement plan, or to update your plan elections.

You must complete this form in its entirety regardless of plan participation.

Please fill in a valid mailing address and valid E-mail address

Social Security Number:		<input type="checkbox"/>	Female	<input type="checkbox"/>	Male
Name:		First	M.I.	Last	
Address 1:					
Address 2:					
City:		State:		Zip Code:	
Date of Birth:		Date of Hire:		<input type="checkbox"/>	Rehired Employee
E-mail Address:					

SIGNATURE

Date:

Sign Here

MY SIGNATURE IS CONSENT TO THE FOLLOWING ELECTIONS AND I UNDERSTAND THE FOLLOWING INFORMATION ABOUT DEFERRALS:

(1) My elections in Section 2 regarding the type of deferrals is irrevocable once the Employer withholds the deferrals from my paycheck. (2) My deferral Account will be subject to Trust investment gain or loss in accordance with my investment direction. (3) Any change of election regarding the type of deferrals is effective only for deferrals from paychecks I receive after the Plan Administrator accepts my change of election. (4) This agreement is effective on the date the Plan Administrator accepts it and remains in effect until I revoke or modify it. I may change my Agreement only by providing to the Plan Administrator a new PI InterLink Election Form. If I enter into a new Agreement subsequent to the date of this Agreement, the subsequent Agreement acts as a revocation of the prior Agreement, except as I specify otherwise in this Agreement. (5) I have a duty to review my pay records to confirm the employer properly has implemented my PI InterLink Election Form and to inform the Plan Administrator if I discover any discrepancy between my pay records and this Election Form. I understand that my failure to report any discrepancy may result in a loss of or reduction in my ability to defer. (6) I am 100% vested immediately in my deferral account. I may receive distribution of my deferral Account only in accordance with the Plan terms. (7) Making a Pre and/or Post Tax Deferral will authorize the Company to withhold this amount from each future payroll period compensation limited to the calendar year IRC 402(g) limitation & Catch-Up eligible amounts. (8) My (pre-tax) deferrals are not subject to federal or state income taxes until distributed from the Plan, but are subject to Social Security taxes. I understand the amount of (non-Roth) deferrals I have elected in this Agreement will reduce my current Compensation includible in income for the taxable year of the deferral. My Roth deferrals are subject to Income Tax and to Social Security Taxes at the time of deferral. I understand the amount of Roth deferrals I have elected in this Agreement will NOT reduce my current Compensation includible in income for the taxable year of the deferral. If I meet certain requirements, my Roth deferrals and the income thereon will not be subject to Income Tax when distributed from the Plan.

2: SAVINGS ELECTION

<input type="checkbox"/> Pre-Tax Elective Deferrals I elect to save _____% OR \$ _____	<input type="checkbox"/> I hereby elect NOT to save in the Plan.
<input type="checkbox"/> POST-Tax Designated ROTH Deferrals I elect to save _____% OR \$ _____	

3: ELECTION CHANGES

You may change [Increase/Decrease] your savings amount effective with the following dates:

Quarterly by January 1, April 1, July 1, and October 1

You may revoke your savings amount effective with the following dates:

Immediate

You may change your investment elections effective with the following dates:

Quarterly by January 1, April 1, July 1, and October 1

4: INVESTMENT ELECTION

Please invest my accounts in **whole** percentages as follows.
Investment elections will apply to all current and future employee/employer accounts
(as allowed by the plan) until modified by the participant

MAT057027	Appleton Group Conservative		%
MAT057028	Appleton Group Moderate		%
MAT057026	Appleton Group Portfolio		%
Verify elections total 100% and print name here _____			100 %

Elections are in **whole percentages** (no decimals or fractions)

No election changes - keep my current elections.
(If no prior election exists, this check box is not applicable and may not be chosen.)

Changes to your existing account balance or future investment elections should be made by accessing PI InterLink at www.PensionInc.net if authorized by the Plan, or by calling Pension Inc. at (920) 432-7020.