



SOUTHERN CALIFORNIA PIPE TRADES DEFINED CONTRIBUTION FUND

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Plan Number: LO5605

ENROLLMENT/CHANGE/OPT-OUT FORM

PART 1—EMPLOYEE INFORMATION

Complete all applicable sections and deliver to your Employer. IF YOU DO NOT RETURN THIS FORM TO YOUR EMPLOYER, YOU WILL BE AUTOMATICALLY ENROLLED IN THE DEFINED CONTRIBUTION (401(k)) PLAN.

Last Name, First Name, Middle Initial

Social Security Number (last four digits required)

Address (address will be updated in the SCPT Funds' records if different from what is on file)

Phone Number

Email Address

Date of Birth Marital Status: [ ] Single [ ] Married [ ] Widowed [ ] Legally Divorced (Date: \_\_\_\_\_)

PART 2—ENROLLMENT & CONTRIBUTION INFORMATION

Enter an election for 1, 2, or 3 below. If you choose election 3, enter an election both for Pre-tax 401(k) and for After-tax Roth 401(k), even if the election is zero. If you wish to retain an existing election and add or change another (for instance, you want to retain your existing Pre-tax 401(k) contribution and add a Roth 401(k) contribution), list both elections.

- 1. [ ] I choose the automatic enrollment pre-tax 401(k) contributions of \$0.50 per hour. (Overtime premium does not apply.) OR
2. [ ] I do not wish to participate in the Defined Contribution Plan; do not automatically enroll me. I understand that if I change employers I will be automatically enrolled at that time unless I execute a new opt-out form. OR
3. [ ] I want to make the following Contributions:
a. Pre-tax 401(k)—I wish to contribute the following amount per hour as before-tax contributions. I understand that this will reduce the amount of my taxable compensation reported on Form W-2.
Select one: [ ]\$5.00 [ ]\$3.00 [ ]\$1.00 [ ]Other amount \$ \_\_\_\_\_ (in \$.25 increments)
[ ] When I work overtime, I also elect to have my contribution multiplied by the applicable overtime premium rate (for example, if I have elected to contribute \$1/hour, when I work overtime payable at time-and-one-half, my contribution for those overtime hours will be \$1.50/hour.)
b. After-tax Roth 401(k)—I wish to contribute the following per hour as after-tax contributions. I understand that this will NOT reduce the amount of my taxable compensation reported on Form W-2.
Select one: [ ]\$5.00 [ ]\$3.00 [ ]\$1.00 [ ]Other amount \$ \_\_\_\_\_ (in \$.25 increments)
[ ] When I work overtime, I also elect to have my contribution multiplied by the applicable overtime premium rate (for example, if I have elected to contribute \$1/hour, when I work overtime payable at time-and-one-half, my contribution for those overtime hours will be \$1.50/hour).

PART 3—AUTHORIZATION & AGREEMENT

I have read and I understand the disclosures found on both sides of this form.

X Signature

Date

PART 4—EMPLOYER INFORMATION

Employer Name

Employer No.

After implementing the employee's contribution election, promptly forward this form to the address above OR email to info@scptac.org OR fax to (213) 487-7921.