



Florida Municipal Pension Trust Fund Participation Agreement

☐ Applies to only 401(a) ☐ Applies to only 457(b) ☐ Applies to both 401(a) and 457(b) plans (default if none selected)

IDENTIFYING INFORMATION

Mr/Mrs/Ms First Name _____ Middle Initial _____ Last Name _____
Home Address _____ City _____
State _____ Zip _____ Phone _____ Date of Birth _____
Email _____ Date of Hire _____
SSN _____ Employer Name _____

PAYROLL INFORMATION – FOR 457(B) PLANS ONLY

Pre-tax Traditional Contributions per pay: _____% or \$ _____ x _____ # of Paydays per year = EE Annual Contributions \$ _____

After-tax Roth Contributions per pay: _____% or \$ _____ x _____ # of Paydays per year = EE Annual Contributions \$ _____

* Cannot exceed IRS Code Limits (2024 IRS Code limit is \$23,000 and an additional \$7,500 catch-up if over age 50)

BENEFICIARY DESIGNATION

In accordance with the Plan, I hereby revoke any previous designations of primary beneficiary(ies) and contingent beneficiary(ies) (if any) and designate as primary beneficiary(ies) and contingent beneficiary(ies) (if any) in the event of my death, the following as provided below. Unless you specify otherwise, if you designate more than one beneficiary in any one class, the beneficiaries in the class will share equally.

Primary Beneficiary: (If more than one primary beneficiary is designated, provide all information for each primary beneficiary and percentage of benefit, which must equal 100% among all primary beneficiaries)

Name _____ Relationship: _____

*Social Security #: _____ Date of Birth: _____ Benefit Percentage: _____

Address: _____ Phone: _____

Contingent Beneficiary(ies): (If more than one contingent beneficiary is designated, provide all information for each contingent beneficiary and percentage of benefit, which must equal 100% among all contingent beneficiaries. The designation of a contingent beneficiary is applicable under this plan benefit only if the primary beneficiary designated above is not living at the time of the participant's death. If more than one primary beneficiary is designated, contingent beneficiary/beneficiaries must be identified specifically for each primary beneficiary.)

Name _____ Relationship: _____

*Social Security #: _____ Date of Birth: _____ Benefit Percentage: _____

Address: _____ Phone: _____

Contingent Beneficiary(ies):

Name _____ Relationship: _____

*Social Security #: _____ Date of Birth: _____ Benefit Percentage: _____

Address: _____ Phone: _____

Beneficiaries under legal age will be granted their appropriate distribution in accordance with this form unless a specific Custodial Trust was established prior to the death of the participant or an estate settlement changes the designation. It is the responsibility of the beneficiary to notify the Trustee (Participant's Employer) of any existing custodial or other arrangement.

* Social security numbers are requested and maintained on behalf of all plan participants, beneficiaries and retirees for data collection, reconciliation, tracking and benefit processing, tax reporting and identity verification purposes. Social security numbers are also used as a unique number identifier and may be used for death record searches.

The right to revoke this designation by the participant is reserved by signing and filing with the (Employer, Board, Plan, etc.) a new beneficiary designation form. The consent of a participant's beneficiary to any change of beneficiary shall not be required.

PARTICIPATION AGREEMENT - Investment Options as of 6/30/2024**Log into your account online to make selections or contact FMPTF for help at (888) 945-7401**

| Asset Class | Fund Name | Symbol | Expense |
|-------------------|---|--------|---------|
| Cash | Vanguard Federal Money Market | VMFXX | 0.11% |
| Stable Value | Vanguard Retirement Savings Trust | n/a | 0.43% |
| Bonds | Vanguard Intermediate-Term Investment Grade | VFIDX | 0.10% |
| | Vanguard Total Bond Market Index | VBTLX | 0.05% |
| | Vanguard Total International Bond Index | VTABX | 0.11% |
| Balanced | Vanguard Wellington Fund | VWENX | 0.18% |
| Large Cap Stock | Vanguard Windsor II | VWNAX | 0.26% |
| | Vanguard Institutional Index | VINIX | 0.04% |
| | Vanguard FTSE Social Index | VFTAX | 0.14% |
| | Vanguard PrimeCap | VPMAX | 0.31% |
| Small Cap Stock | Vanguard Small-cap Index Signal | VSMAX | 0.05% |
| | EV Atlanta Capital SMID-Cap I | ERASX | 0.82% |
| International | Vanguard Total International Stock Index | VTIAX | 0.12% |
| | Vanguard Emerging Markets Stock Index | VEMAX | 0.14% |
| | Vanguard All World ex-US Small Cap | VFSAX | 0.17% |
| Real Estate | Vanguard Real Estate | VGSLX | 0.13% |
| Target Retirement | Vanguard Target Retirement Income | VTINX | 0.08% |
| | Vanguard Target Retirement 2020 | VTWNX | 0.08% |
| | Vanguard Target Retirement 2025 | VTTVX | 0.08% |
| | Vanguard Target Retirement 2030 | VTHRX | 0.08% |
| | Vanguard Target Retirement 2035 | VTTHX | 0.08% |
| | Vanguard Target Retirement 2040 | VFORX | 0.08% |
| | Vanguard Target Retirement 2045 | VTIVX | 0.08% |
| | Vanguard Target Retirement 2050 | VFIFX | 0.08% |
| | Vanguard Target Retirement 2055 | VFFVX | 0.08% |
| | Vanguard Target Retirement 2060 | VTTSX | 0.08% |
| | Vanguard Target Retirement 2065 | VLXVX | 0.08% |

I hereby request to participate in the FMPTF Retirement Plan, and I agree to all provisions of the Plan and this agreement. I certify that everything I wrote on this form is true, correct and complete. I certify, under penalties of perjury, that my Social Security Number shown is correct. I am **not** domiciled in or a resident of any place other than the address shown above. I understand that I may be subject to civil and criminal penalties and punishment for any knowingly false statement on this form. If the Plan pays or fails to pay any benefit in reliance on my false statement, I will be liable for the Plan's damages, including (but not limited to) investigation expenses, legal fees and costs.

By signing below, I acknowledge:

1. Representatives of the Florida Municipal Pension Trust Fund (FMPTF) or the Florida League of Cities, Inc. cannot provide me with investment advice, and they have not provided me with any investment advice.
2. I am responsible for my decisions on investing in one or more of the investment options.
3. I have read and agree to the terms of the FMPTF Participation Agreement.
4. The default investment for a participant that does not make an investment selection is an age-appropriate Vanguard Target Retirement Fund.
5. I must elect my investment choices online at FLCretirement.com or by contacting a FMPTF representative.

(Print Name of Participant)

(Print Name of Witness)

(Date Signed)

(Signature of Participant)

(Date Witnessed)

Signature of Witness: Plan
Official or Notary Public

*Please submit completed, signed forms to **Your Human Resources Department***

EMPLOYER'S INSTRUCTION AND APPROVAL

Authorized Signature on behalf of the Employer

Date

Participant Date of Hire

Employer: Please send a copy to: FMPTF c/o DC Program, P.O. Box 1757, Tallahassee, FL 32302 or retirement@flcities.com.