Retirement Advantage 403(b)(7)

Enrollment form completion instructions
This enrollment form is to be used for the Iowa Retirement Advantage 403(b)(7). We have designed this **enrollment form** to request only the information necessary to start this account. Complete it carefully. Otherwise, the enrollment form may be returned to you.

Personal information – Complete this section with information about the person who will own this investment.

Account information – This information helps demonstrate that you have sufficient income/assets for the proposed investment.

Investment experience/information
Question 1- Provide the earliest point at which the owner started investing in each type of product.
Question 2 – Provide the timeframe the owner anticipates he/she will need to start withdrawing this money.
Question 3- We are required by law to have a reason that the owner is purchasing this financial services product. Check all that apply. If other reasons exist, please specify.
Question 4 – This seeks to answer how much risk the owner is willing to assume in this investment.

Employer information – This is information on where the owner is employed, along with the location number. Find the **location number here**.

Investment option selection – You can **find investment options here**.

Beneficiary information - Provide information on both the primary and contingent beneficiaries for the account by completing all fields. To the extent possible, provide full or complete names of all designated beneficiaries. To eliminate the necessity of changing the beneficiary each time a child is born or adopted, you may designate one of the following: "All my children" or Children born and/or legally adopted of the marriage to (spouse's name)."

Consent to electronic delivery of materials – If you wish to receive electronic delivery of required materials, complete the necessary information. Once complete, please sign and date.

Authorization and Signature – This section acknowledges that the owner has received the contract prospectus and that the owner understands that the investment options may have trading restrictions.

Customer identification and signatures – This section provides Horace Mann with enough information to ensure we can verify your identity and open the account.

Please remember to complete the 403b Salary Reduction form and take this to your district business office. Contributions cannot start until the district receives this document.

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