



**CITY OF SAN JOSE
DEFERRED COMPENSATION PLAN
EZ ENROLLMENT/PARTICIPATION AGREEMENT
Plan No. 666779**

PARTICIPANT INFORMATION

Name _____
 (Last) (First) (Middle Initial) **Social Security #** _____ **Employee ID#** _____

Address _____
 (Number & Street) **Date Employed** _____ **Rehired?** *Check if yes*

 (City) (State) (ZIP Code) **Date of Birth** _____ **Location Code** _____

Phone (_____) _____ **Email** _____ **Gender:** Male Female
 Home Phone No. Work Phone No. Address

DEFERRAL ELECTION

Salary Reduction Amount \$ _____ from my salary per pay period *Subject to minimum of bi-weekly contribution of \$25.00*
This agreement will be effective the first available pay period of the month following the month this form is received at the address shown below.

BENEFICIARY DESIGNATION

I designate the following beneficiary or beneficiaries in accordance with the Plan. The total percentage for primary beneficiary must total 100%. The total percentage for contingent beneficiary, if applicable, must total 100%. I understand that I can change my beneficiary designation at any time by contacting ING at (800) 584-6001 or clicking on the Log In button from www.ingretirementplans.com/custom/sanjose.

	Complete Legal Name	Relationship	SSN	%
<input checked="" type="checkbox"/> Primary				
<input type="checkbox"/> Primary				
<input type="checkbox"/> Contingent				
<input type="checkbox"/> Primary				
<input type="checkbox"/> Contingent				

EMPLOYEE AGREEMENT TO PARTICIPATE IN CITY OF SAN JOSE DEFERRED COMPENSATION PLAN

The City of San José (the Employer) has established an Internal Revenue Code Section 457(b) Deferred Compensation Plan (Plan) for the benefit of its employees. The Plan provides that eligible individuals may elect to join and become participants in the Plan (subject to the limitations established in the Plan) upon executing and filing a Participation Agreement with the Employer.

The employee acknowledges the following:

- I have received a packet of information outlining the Plan, as well as an enrollment kit which includes contract and investment options information.
- I elect to participate in the Plan and agree to defer compensation to the Plan in accordance with the Plan and Internal Revenue Code (Code).
- I agree that all rights to the deferred compensation shall be governed by the terms and conditions of the Plan and Code.
- I agree that the elections indicated here will remain in effect until later changed or revoked by me or my contributions during any year reach the maximum dollar amount allowed under the Plan and Code. If the later occurs, my salary reduction will automatically stop.
- I understand I am electing to utilize the City of San José EZ Enrollment / Participation process and will have contributions to the Plan invested in the default fund identified below, which has been designated by the Employer. I understand that neither the principal nor interest is guaranteed, I assume the risk of investment performance and that my account balance will fluctuate daily. **I further understand that my investment allocations may be changed at any time and am encouraged to contact an ING representative for personal assistance. TO TRANSFER/CHANGE INVESTMENTS CALL: 800.584.6001 or VISIT www.ingretirementplans.com/custom/sanjose.**

<u>Your Date of Birth</u>	<u>Fund #</u>	<u>Fund Name</u>
Prior to 1946	795	Vanguard Target Retirement Income Fund - Investor Shares
Between 01/01/1946 and 12/31/1950	791	Vanguard Target Retirement 2015 Fund - Investor Shares
Between 01/01/1951 and 12/31/1955	1296	Vanguard Target Retirement 2020 Fund - Investor Shares
Between 01/01/1956 and 12/31/1960	926	Vanguard Target Retirement 2025 Fund - Investor Shares
Between 01/01/1961 and 12/31/1965	1297	Vanguard Target Retirement 2030 Fund - Investor Shares
Between 01/01/1966 and 12/31/1970	793	Vanguard Target Retirement 2035 Fund - Investor Shares
Between 01/01/1971 and 12/31/1975	1298	Vanguard Target Retirement 2040 Fund - Investor Shares
Between 01/01/1976 and 12/31/1980	794	Vanguard Target Retirement 2045 Fund - Investor Shares
Between 01/01/1981 and 12/31/1985	1299	Vanguard Target Retirement 2050 Fund - Investor Shares
After 01/01/1986	2473	Vanguard Target Retirement 2055 Fund - Investor Shares

I certify that the information on this form is true, complete and accurate. I understand that withdrawal of accumulated funds is permitted only upon the occurrence of a Qualifying Event or due to a financial hardship beyond my control. I acknowledge I have read and understand the "City of San José Deferred Compensation Plan Disclosure Sheet" and I hereby authorize this salary reduction.

**RETURN
COMPLETED
FORM TO:** **City of San José Human Resources**
 Attn: Deferred Compensation Staff
 200 East Santa Clara Street-Wing 2nd Fl
 San José, CA 95113
 Phone: 408.881.0110 Fax: 408.999.0899

Participant's Signature **Date** **San José HR Authorized Signature** **Date**