

YMCA RETIREMENT FUND



REQUEST FOR FORMS AND PUBLICATIONS

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FORM	DESCRIPTION	QUANTITY
Voluntary Contributions (ASR-9)	To start or increase your savings with a voluntary account	_____
Application to Participate in the YMCA Retirement Plan (ASR-1)	To enroll an employee for the first time	_____
Change of Name (ASR-7)	To record a participant's legal name change	_____
Designation of Beneficiary (ASR-8)	To legally establish who receives the benefit in the event of the participant's death	_____

PUBLICATION	DESCRIPTION	QUANTITY
Eligibility and Enrollment Q&As	FAQs on the various aspects of eligibility and enrollment	_____
Fund Basics	A description of the Fund and its benefits – may be used in recruitment and employee benefits packets.	_____
Getting a Loan from Tax-Deferred Savings	The basics on taking a loan from a 403(b) Smart Account	_____
Glossary: Helpful Definitions	Definitions of terms used in Fund communications	_____
A Guide to Leaving & Retiring	A description of options for accounts if employees leave or retire	_____
Retire...Rehire?	Answers to FAQs to help you understand this complex issue	_____
403(b) Smart Account Paycheck Stuffer	An insert to encourage all staff to start saving for a strong future	_____
3 Ways to Save Poster	8" x 10" poster that can be displayed at your YMCA to encourage all staff to start saving for a strong future	_____
Your Guide to the YMCA Retirement Fund	An easy-to-understand introduction to the Retirement Plan and Tax-Deferred Savings Plan (the Fund mails a guide to each new participant upon enrollment)	_____

YMCA Name _____	YMCA # _____
Attn: _____	
Address _____	
City _____	State _____ Zip _____ Tel _____
This form was completed by _____ Date _____	

EX-49/08