



Billing Change Form

United Methodist Personal Investment Plan (UMPIP)

Instructions

- Complete all the information below for each employee making a change to his or her UMPIP before-tax or after-tax billing amount. Indicate a percentage or dollar amount for which the participant wants to be billed. Participants can make before-tax or after-tax contributions, or a combination of both. If you wish to discontinue billing, write in "0" next to before-tax or after-tax.
- To make before-tax or after-tax contributions, the employee and salary-paying unit must complete a *Before-tax and After-tax Contributions Agreement* or *Before-tax and After-tax Contributions Agreement/Automatic Enrollment Notice*. This form does not need to be returned to the General Board of Pension and Health Benefits (General Board).
- Please mail this *Billing Change Form* to the General Board at the address above, or fax it to the attention of the Data team at 1-847-866-5195.

Name of employer/salary-paying unit _____ Employer # _____

Address of employer/salary-paying unit _____ Daytime phone # (____) _____

<p>Name _____</p> <p>Social Security # _____</p> <p>Effective date _____</p> <p>Indicate the amount you want to be billed monthly. If you wish to discontinue billing, indicate "0." Choose one or both:</p> <p><input type="checkbox"/> Before-tax (<i>indicate % rate or \$ amount</i>): _____</p> <p><input type="checkbox"/> After-tax (<i>indicate % rate or \$ amount</i>): _____</p>	<p>Name _____</p> <p>Social Security # _____</p> <p>Effective date _____</p> <p>Indicate the amount you want to be billed monthly. If you wish to discontinue billing, indicate "0." Choose one or both:</p> <p><input type="checkbox"/> Before-tax (<i>indicate % rate or \$ amount</i>): _____</p> <p><input type="checkbox"/> After-tax (<i>indicate % rate or \$ amount</i>): _____</p>
<p>Name _____</p> <p>Social Security # _____</p> <p>Effective date _____</p> <p>Indicate the amount you want to be billed monthly. If you wish to discontinue billing, indicate "0." Choose one or both:</p> <p><input type="checkbox"/> Before-tax (<i>indicate % rate or \$ amount</i>): _____</p> <p><input type="checkbox"/> After-tax (<i>indicate % rate or \$ amount</i>): _____</p>	<p>Name _____</p> <p>Social Security # _____</p> <p>Effective date _____</p> <p>Indicate the amount you want to be billed monthly. If you wish to discontinue billing, indicate "0." Choose one or both:</p> <p><input type="checkbox"/> Before-tax (<i>indicate % rate or \$ amount</i>): _____</p> <p><input type="checkbox"/> After-tax (<i>indicate % rate or \$ amount</i>): _____</p>

Additional Information

- Participants have the responsibility to determine that contributions made on their behalf are within the limits specified by the Internal Revenue Code and regulations issued thereunder.
- Billing for the amounts listed above will continue until:
 - the participant is no longer employed by this employer;
 - the employer submits another *Billing Change Form* to the General Board; or
 - the employer provides written notice to the General Board that the before-tax and after-tax contribution agreement has been terminated or the billing amount has been changed.