Vanguard Enrollment/Change Request

Vanguard®

The Animation Guild 401(k) Plan

Plan # 094523

I. Account Information

☐ New Enrollment ☐ Payroll Deduction Change ☐ Name or Address Change ☐ Change Employer

Social Security # _____ Marital Status: ☐ Married ☐ Single or legally separated

Name _____ _____ _____
First Name Middle Initial Last Name

Address _____

City _____ State _____ Zip _____

Date of Birth: _____ Email: _____

Daytime Phone #: _____ Evening Phone #: _____

Studio Name: _____

Hire date: _____ Project Name: _____

Payroll Company: _____ Union Local # _____

II. Payroll Directions

I authorize my employer to deduct the following amount from my compensation each pay period and contribute that amount to my savings plan account.

Required fields: Fill **ALL** boxes in this section. Choose 0 (zero) or from 2% (minimum) to 40% (maximum) .
DO NOT LEAVE BLANKS: Empty boxes will delay request processing until full information can be obtained.

Pre-tax % Contribution _____ % (indicate from 2% to 40% in whole percentages)

Pre-tax Catch-up % Contribution _____ % If you reach age 50 any time during the calendar year, or are over 50, you may be eligible to contribute a catch-up contribution.

Note: Your total contributions cannot exceed the limits established by the plan.

Roth % Contribution _____ % (indicate from 2% to 40% in whole percentages)

Roth Catch-up % Contribution _____ % If you reach age 50 any time during the calendar year, or are over 50, you may be eligible to contribute a catch-up contribution.

For information on your previous settings, contact The Animation Guild at 401k@tag839.org or 818-845-7500.

Please make a copy for your records.
(03/25/2024)

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III. Investment Direction (For New Enrollees Only)

If you are an existing participant and you would like to make an exchange or rebalance your account, please call Vanguard Participant Services at 800-523-1188.

I hereby direct that all future amounts withheld from my compensation and all employer contributions be invested in the following manner. Contributions must be in increments of 1% and the total must equal 100%.

Target Retirement Trusts If you choose this investment approach, you may want to consider investing 100% of your contributions in one Target Retirement Trust.

Allocation	Fund Code	Fund Name	Allocation	Fund Code	Fund Name
	001471	Target Retirement Income Trust II		001479	Target Retirement 2045 Trust II
	001474	Target Retirement 2020 Trust II		001480	Target Retirement 2050 Trust II
	001475	Target Retirement 2025 Trust II		001489	Target Retirement 2055 Trust II
	001476	Target Retirement 2030 Trust II		001693	Target Retirement 2060 Trust II
	001477	Target Retirement 2035 Trust II		001794	Target Retirement 2065 Trust II
	001478	Target Retirement 2040 Trust II		00V006	Target Retirement 2070 Trust II

Core Funds Or for the following list of funds, specify percentages in 1% increments.

Allocation	Fund Code	Fund Name	Allocation	Fund Code	Fund Name
	00007E	Vanguard Retirement Savings Trust III		0000X7	Vanguard Small-Cap Index Fund
	00002K	Vanguard Total Bond Market Index Fund		000569	Vanguard Total International Stock Index Fund
	000033	Vanguard Federal Money Market Fund		0000XE	Vanguard Mid-Cap Index Fund
	006347	Baird Core Plus Bond Fund		006110	MassMutual Mid Cap Growth Fund
	000094	Vanguard Institutional Index Fund		003186	American Funds EuroPacific Growth Fund
	007210	American Beacon Large Cap Value Fund		002977	DFA US Targeted Value Portfolio
	006237	JPMorgan Large Cap Growth Fund		002187	DFA International Small Company Portfolio
	003081	TIAA-CREF Social Choice Equity Fund		003182	DFA Emerging Markets Portfolio

Your allocations must total 100%

Note: If you fail to complete the investment elections above, your contribution will automatically be invested in the date specific Target Retirement Trust closest to the year you will reach age 65.

IV. Authorization

Signature of Participant Date

Participant Mailing Instructions

U.S. Mail
T.A.G. 401(k) Plan
1105 N. Hollywood Way
Burbank, CA 91505
FAX: 818-843-0300
Email: 401k@tag839.org
Phone: 818-845-7500