



## CHOOSE YOUR FUNDS

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Use one of the three options below to choose your investment funds. For fund information, visit [GuideStoneRetirement.org/InvestmentChoices](http://GuideStoneRetirement.org/InvestmentChoices).

### OPTION 1 — ONE-CHOICE APPROACH/GUIDESTONE TARGET DATE FUNDS

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Choose the appropriate MyDestination Fund® that most closely corresponds to the year in which you plan to retire.

(Not applicable if you completed Option 2 or Option 3.)

- MyDestination 2015 Fund
- MyDestination 2025 Fund
- MyDestination 2035 Fund
- MyDestination 2045 Fund
- MyDestination 2055 Fund

### OPTION 2 — ASSET ALLOCATION APPROACH/GUIDESTONE ASSET ALLOCATION FUNDS

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Choose the (one) fund that best represents your investor profile.

(Not applicable if you completed Option 1 or Option 3.)

- Conservative** — Conservative Allocation Fund
- Moderately conservative** — Balanced Allocation Fund
- Moderately aggressive** — Growth Allocation Fund
- Aggressive** — Aggressive Allocation Fund

### OPTION 3 — BUILD-YOUR-OWN APPROACH/GUIDESTONE SELECT FUNDS

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Use Option 3 if you choose to mix your own portfolio from the **Select Funds** and/or any of the other funds available.

(Not applicable if you completed Option 1 or Option 2.)

Investment fund: \_\_\_\_\_ Percentage: \_\_\_\_\_ %

Investment fund: \_\_\_\_\_ Percentage: \_\_\_\_\_ %

Investment fund: \_\_\_\_\_ Percentage: \_\_\_\_\_ %

Investment fund: \_\_\_\_\_ Percentage: \_\_\_\_\_ %

Total must equal 100%: \_\_\_\_\_ %

Please write in the space below for more than four fund choices.

You have the right to make plan investment elections for contributions made on your behalf to the retirement plan. GuideStone has designated a Target Date Fund to which contributions are made if you do not specify an investment. All contributions will be placed in this fund until you change your election, and you have sole responsibility for this default election.

*Participants are prohibited from exchanging out of the Capital Preservation Fund to a “competing fund” without first investing in a “non-competing fund” for a period of at least 90 days. Also, simultaneous exchanges are not allowed. For more complete information, visit [GuideStone.org](http://GuideStone.org) or call 1-888-98-GUIDE (1-888-984-8433).*

**NEW VOCATIONAL ASSOCIATION/MINISTRY INFORMATION (TO BE COMPLETED BY BILLING CONTACT)**

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Complete if this is the first employee to enroll in the Southern Baptist Churches 403(b)(9) Retirement Plan from this vocational association/ministry.

Employer Tax ID Number: \_\_\_\_\_ Employer number: \_\_\_\_\_

Billing contact name: \_\_\_\_\_ Contact telephone number: (\_\_\_\_\_) \_\_\_\_\_

Contact email address: \_\_\_\_\_

Billing address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

The vocational association/ministry has:

- |   |  |
|---|--|
| <input type="checkbox"/> Received IRS approval as a Code Section 501(c)(3) organization   | <input type="checkbox"/> Secured state convention approval that association/ministry is a "Church" within the meaning of the Southern Baptist Churches 403(b)(9) Retirement Plan |
| <input type="checkbox"/> Copy of IRS Code Section 501(c)(3) determination letter attached |  |

**PARTICIPANT CERTIFICATION SIGNATURE**

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I certify that: I serve as a full-time evangelist/vocational minister or counselor through the named association/ministry. My ministry is to Southern Baptists. Failure to serve Southern Baptists or secure and maintain Code Section 501(c)(3) status will effectively end my participation in the Southern Baptist Churches 403(b)(9) Retirement Plan.

I acknowledge and agree that the named association/ministry has sole responsibility for determining whether the association/ministry is a "Church" or an organization controlled by or associated with a church or convention or association of churches. I will promptly notify GuideStone of any changes in facts or circumstances that could affect its eligibility as set forth on this form.

I understand that my application will not be processed if I fail to attach a copy of the IRS determination letter for the association/ministry through whom I serve.

Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Return your completed form to: Retirement Operations  
GuideStone Financial Resources, SBC  
5005 LBJ Freeway, Ste. 2200  
Dallas, TX 75244-6152

Or you may fax your form to: 1-866-692-6327

## Vocational association/ministry information

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If you are employed by your own vocational association/ministry and wish to participate in the Southern Baptist Churches 403(b)(9) Retirement Plan, you and your association/ministry must meet three sets of requirements.

These include:

- (1) Legal requirements,
- (2) Plan requirements and
- (3) State convention requirements.

What **legal** requirements must a vocational association/ministry meet?

- A vocational association/ministry must be an organization exempt from tax under Section 501(c)(3) of the *Internal Revenue Code* ("501(c)(3)").
- The Southern Baptist Churches 403(b)(9) Retirement Plan is a Code Section 403(b) plan. The *Internal Revenue Code* limits participation in Code Section 403(b) plans to employees of 501(c)(3) organizations (as well as employees of certain educational organizations and government employees). Section 501(c)(3) status is a basic, preliminary legal requirement.
- Persons who work for a vocational association/ministry may only participate in a Code Section 403(b) plan such as the Southern Baptist Churches 403(b)(9) Retirement Plan if the vocational association/ministry has 501(c)(3) exempt status. **You must attach a copy of the determination letter to the application.** Failure to provide this documentation will result in rejection of this application.
- IRS *Publication 557* discusses the rules and procedures for an organization to obtain 501(c)(3) exempt status. Legally, an organization does not have to be incorporated to fit within 501(c)(3). However, the state convention may require a vocational evangelistic association/ministry to be incorporated.
- A church, its integrated auxiliaries and a convention or association/ministry of churches are not required to file *Form 1023 (Application for Recognition of Exemption)* with the IRS to be exempt from federal income taxes or to receive tax-deductible contributions. However, a vocational association/ministry will be required to file this form and submit the required information to achieve 501(c)(3) exempt status.

What **plan** requirements must a vocational evangelistic association/ministry meet?

- The vocational evangelistic association/ministry must be a "Church." It must also be an "Eligible Church" to receive state convention contributions.
- A person who is in service with a "Church" is eligible to participate in the Southern Baptist Churches 403(b)(9) Retirement Plan.
- The term "Church" means an organization that meets all of the following requirements:
  - (1) The organization must be a Southern Baptist organization.
  - (2) The organization must be regarded as a "Church" by the state convention.
  - (3) The organization must be a 501(c)(3) organization.
  - (4) The organization must be a qualified church-controlled organization ("QCCO").

What **state** convention requirements must a vocational association/ministry meet?

- A vocational association/ministry must meet state convention requirements for a "Church." It must also meet state convention requirements for an "Eligible Church" to get state convention contributions.
- The state convention sets the requirements for an organization to achieve "Church" or "Eligible Church" status under the Southern Baptist Churches 403(b)(9) Retirement Plan. The state convention is responsible for monitoring whatever special requirements it imposes. For example, the state convention may require a vocational association/ministry be incorporated (even though this is not "legally" required) to be treated as an "Eligible Church." The state convention is responsible for monitoring this requirement.