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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 1-847-866-5195.

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

Address of employer/salary-paying unit _____

Primary phone # (____) _____

Signature of Authorized Representative _____ Date _____

Name _____

~~Social Security #~~ _____

Effective date _____

Indicate the amount you want to be billed monthly. If you wish to discontinue billing, indicate "0." Choose one or both:

Before-tax (indicate % rate or \$ amount): _____

After-tax (indicate % rate or \$ amount): _____

ROTH

Name _____

~~Social Security #~~ _____

Effective date _____

Indicate the amount you want to be billed monthly. If you wish to discontinue billing, indicate "0." Choose one or both:

Before-tax (indicate % rate or \$ amount): _____

After-tax (indicate % rate or \$ amount): _____

ROTH

Name _____

~~Social Security #~~ _____

Effective date _____

Indicate the amount you want to be billed monthly. If you wish to discontinue billing, indicate "0." Choose one or both:

Before-tax (indicate % rate or \$ amount): _____

After-tax (indicate % rate or \$ amount): _____

ROTH

Name _____

~~Social Security #~~ _____

Effective date _____

Indicate the amount you want to be billed monthly. If you wish to discontinue billing, indicate "0." Choose one or both:

Before-tax (indicate % rate or \$ amount): _____

After-tax (indicate % rate or \$ amount): _____

ROTH

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.