Touchstone Investments®
DISTINCTIVELY ACTIVE

USI
CONSULTING GROUP

401(k) Program
Salary Deferral Agreement

Instructions: Only use this form if you already completed an Account Application.

Employee Information (Please complete all sections.)			
Employee Name			Social Security Number
Street Address			Date of Hire
City	State	Zip Code	Date of Birth
Daytime Phone		Email Address	
Employer Name and Address			

Check one: ☐ New Agreement ☐ Change to previous Agreement

Contribution Election

Indicate the amount of compensation you want to contribute to the Plan each payroll period or check the box if you choose not to contribute at this time. In any year that you are age 50 or older, you may choose to defer up to the additional catch-up contribution limit permitted within the Plan by including that amount in your election.

You may choose both pre-tax and employer contributions, however the sum of both cannot exceed the annual contribution limit.

Refer to your Plan's contribution limits for additional information.

Pre-tax contributions: $__________ *(must be a dollar amount)*

Employer contributions: $__________ *(must be a dollar amount)*

Prior Year contributions: $__________ *(must be a dollar amount)*

Opt-Out:

☐ I choose not to contribute at this time. I understand that I may elect to begin contributing on any future date permitted by the Plan.

Contribution Frequency (select one):

☐ Annual ☐ Monthly (1st business day of each month)

Contribution Amount (select one):

☐ Pre-tax Amount $____________ **or** ☐ Employer Contribution Amount $____________

Contribution Start Date (select one):

☐ Indicate Start Month____________ **or** ☐ Start Immediately

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Prior Year Contributions Frequency (prior year contributions can be made from January through April)

☐ January ☐ February ☐ March ☐ April

If you are submitting a Contribution by check please make it payable as follows:

Charles Schwab Trust Bank

Custodian for the 401(k) Program - #107881

Please note the payment must be in the form of a Certified Check or Cashier's Check. The Plan does not accept personal Checks nor Money Orders.

INVESTMENT ELECTIONS – In what fund(s) would you like to invest?

INVESTMENT OPTION	PERCENTAGE	INVESTMENT OPTION	PERCENTAGE
Touchstone Active Bond Fund Class A	%	Touchstone Small Company Fund Class A	%
Touchstone Balanced Fund Class A	%	Touchstone Non-US ESG Equity Fund Class A	%
Touchstone Flexible Income Fund Class A	%	Touchstone Ultra Short Duration Fixed Income Fund Class A	%
Touchstone International Value Fund Class A	%	Federated Government Obligations Fund SS	%
Touchstone Ares Credit Opportunities Fund Class A	%	Touchstone Strategic Income Opportunities Class A	%
Touchstone Dividend Equity Fund Class A	%	Touchstone Sands Select Growth Fund Class A	%
Touchstone Large Cap Focused Fund Class A	%	Touchstone Value Fund Class A	%
		TOTAL	**100%**

Bank Information

ACH (Automated Clearing House) Debit may only be used for funding contributions. Complete this section if you want your contributions to be taken directly from your bank account.

Bank Name	*Bank Phone*
Account Type: ☐ Checking ☐ Savings	
Bank Routing Transit Number	Bank Account Number

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Employee Acknowledgement

Duty to review pay records. I understand I have a duty to review my pay records (pay stub, etc.) to confirm the Employer properly has implemented my salary reduction election. Furthermore, I have a duty to inform the Employer or its designee if I discover any discrepancy between my pay records and this Salary Reduction Agreement. I understand the Employer, or its designee will treat my failure to report any withholding errors for any payroll to which my Salary Reduction Agreement applies, by the cut-off date for the next following payroll, as my affirmative election to defer the amount actually withheld (including zero). However, I thereafter may modify my deferral election prospectively, consistent with the Plan terms.

_______________________________	_______________________________
Employee Signature	Date

Send completed form to:

USI Consulting Group
Attn: Touchstone Investments Service Team
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Glastonbury, CT 06033
Phone: (866) 305-8846, Plan Code 657
Fax: (610) 537-2708
Email: Touchstonefinancialadvisors@usi.com