



COUNTY OF KERN, CALIFORNIA DEFERRED COMPENSATION PLAN EZ ENROLLMENT/PARTICIPATION AGREEMENT PLAN # 664180

PARTICIPANT INFORMATION

Name _____ (Last) (First) (Middle Initial)	<input type="checkbox"/> Married <input type="checkbox"/> Unmarried <input type="checkbox"/> Male <input type="checkbox"/> Female
Address _____ (Street)	Date of Birth _____
(City) (State) ZIP Code	Date of Hire _____
Social Security _____ Email _____	Work Phone (____) _____
	Home Phone (____) _____

BI-WEEKLY DEFERRAL ELECTION

I request that Kern County defer payment from my salary each paycheck as detailed below. Such deferral will continue until I make a change by contacting Voya Financial® at (800) 584-6001 or by linking to Account Access from <https://KernCounty457.com/>.

Pre-tax Salary Deferral Amount \$ _____ - or- _____ %

Effective Date: This agreement will be effective the first available pay date of the month following the month this form is completed.

BENEFICIARY DESIGNATION

I designate the following beneficiary or beneficiaries in accordance with the Plan. The total percentage for primary beneficiary must total 100%. The total percentage for contingent beneficiary, if applicable, must total 100%.

Complete Legal Name, Address and Phone#	Relationship	Primary	Contingent	%	SSN (Optional)	Date of Birth (Optional)
		<input checked="" type="checkbox"/>	<input type="checkbox"/>			
		<input type="checkbox"/>	<input type="checkbox"/>			
		<input type="checkbox"/>	<input type="checkbox"/>			

EMPLOYEE ELECTION TO UTILIZE EZ ENROLLMENT

I have received information outlining the Deferred Compensation Plan, as well as an enrollment kit which includes information about the contract and investment options. I understand I am electing to utilize the Kern County EZ Enrollment / Participation process and will have my contributions invested in the default investment designated by Kern County. Managed Accounts offered through Morningstar¹ has been selected by the Plan as the default investment. I understand Managed Accounts utilizes a professional Investment Manager to manage my account for me for an additional annual fee as illustrated by the table below. This fee is waived during the first ninety (90) days of my participation, but a portion of the annual fee will be charged monthly thereafter. Additionally, I understand that participation in the Plan has a separate 0.06% Asset Based Fee for administrative services that is separate from Managed Accounts. I further understand that I can change my investment allocation at any time by contacting Voya Financial at (800) 584-6001 or by linking to Account Access at <https://KernCounty457.com/>.

Initial Investment Allocation			Annual Account Fee for Managed Accounts
<i>(Allocations before Morningstar Managed Account advice is posted)</i>			
Asset Class	Fund #	Fund Name	0.45%
Stability of Principal	8920	Kern Stable Value Fund	

During the first 90 days following enrollment in the Plan's Managed Accounts service, the fees listed in the table above are waived.

¹IMPORTANT: The projections or other information generated by Morningstar[®] Retirement ManagerSM regarding the likelihood of various retirement income and/or investment outcomes are hypothetical in nature, do not reflect actual results (including investment results) and are not guarantees of future results. Results may vary with each use and over time.

Morningstar[®] Retirement ManagerSM is offered by Morningstar, Inc. and is intended for citizens or legal residents of the United States or its territories. The investment advice delivered through Morningstar Retirement Manager is provided by Morningstar Investment Management LLC, a registered investment adviser and subsidiary of Morningstar, Inc. Morningstar Investment Managements' advisory service relates solely to the investment options offered under the plan. Retirement plan funding products offered through Voya Financial Partners, LLC (member SIPC) or other broker dealers with which it has selling agreements. Voya Financial provides Morningstar Investment Management with the plan's investment options and information about participants but the decisions regarding the advice provided are made by Morningstar Investment Management. Voya and its companies are not affiliated with Morningstar Investment Management, LLC or its affiliates, and receive no fee or other direct financial benefits from Morningstar Investment Management in connection with the use of its services. The Morningstar name and logo are registered marks of Morningstar, Inc.

I certify that the information on this form is true, complete and accurate.

Advisor Information:
 Liliana Fahel
 Office Code:040
 Agent Code:117

Return Completed Form to:
Treasurer's Office
 1115 Truxtun Ave, 2nd Floor
 Bakersfield, CA 93301-4639
 Phone: (661) 868-3467
 Fax: (661) 868-3409

 Employee's Signature

 Date

DeferredComp@kerncounty.com