Retirement Financial Education Registration Instructions

Enrollment is easy! Complete the form and enroll one of two ways:

1. Fill-in information below and fax the completed form to 815-399-9324.

OR

2. Call toll free 800-963-5501 or 815-394-5500 and ask for ext.103. An available Customer Service Specialist will personally take your information, or you can provide it via voice mail.

Name ____

Name of Employer ____________________________________

Home Address __________________________ **City** ________________

State _____ **Zip** _________ **Home Phone** ______________________

Daytime Work Phone ___________________ **Cell** ___________________

Email ____

Attending with spouse (Circle) **Yes / No**

Check the box next to the appropriate course number and the box next to the specific date you plan on attending.

☐ **RFE200**
401(k) Plan Orientation and Enrollment for Plan Participants
Saturday Mornings from 9-11 a.m.

☐ **Mar.** 4 ☐ **Jun.** 3 ☐ **Sep.** 2 ☐ **Dec.** 2

☐ **RFE201**
Participant Directed Investments (Department of Labor Regulation 404(c) Compliance)
Tuesday Evenings from 6-8 p.m.

☐ **Feb.** 7 ☐ **Apr.** 4 ☐ **Sep.** 5 ☐ **Nov.** 7
☐ **Mar.** 7 ☐ **May.** 2 ☐ **Oct.** 3

Reservation Policies and Miscellaneous Information

Only Employers/Plan Sponsors that are existing clients of ThePensionSpecialists,Ltd., along with their plan participants, are eligible to receive the Retirement Financial Education TPS provides. Scheduling of classes by plan sponsors or plan participants must be received no less then 3 days prior to a selected class date. Classes must have a minimum of 5 and a maximum of 45 participants. Classes not meeting minimum registration count before the scheduled date, will be canceled. In the event a registrant has enrolled in a class not meeting this minimum, the registrant will be contacted at their place of employment immediately upon that determination. Paper, pencils and calculators should be furnished by the registrant. All other materials will be provided by The Pension Specialists,Ltd.