Nationwide® is on your side

Nationwide Retirement Solutions Participation Agreement Payroll Deduction Authorization and Service Request for 457 and 401(a) Plans

Personal Information

457(b) Plan Name:	457(b) Plan ID:
401(a) Plan Name:	401(a) Plan ID:
Name:	Social Security Number:
Address:	City, State, & Zip Code:
Date of Birth:	Home Phone Number:
Email Address:	Work Phone Number:
Date of Hire:	Gender: ☐ Male ☐ Female

Paperless Delivery Consent

Paperless Delivery: By providing your email address you are consenting to receive statements, confirmations, terms, agreements and other information provided in connection with your retirement plan electronically. Unless you choose to have statements, account documents and other documents sent in connection with your retirement plan delivered via US Mail to the mailing address of record by checking the box below, these documents will be made available to you electronically. ☐ **I wish to receive my statements and account documents via US Mail.**

Contribution Summary & Payroll Frequency

	Dollar Amount* OR	Percentage*
Contribution Amount - 457(b) Pre-Tax		
Contribution Amount - 457 Roth**		
Contribution Amount - 401(a) Pre-Tax Employee Employee Mandatory Contribution***		
Total		

Start Contribution on: ____________________________

Payroll Frequency: Please select your payroll frequency to insure timely processing.

☐ Weekly
☐ Monthly
☐ Semi-Monthly
☐ Bi-Weekly
☐ Other________________

NOTE: All increases, decreases and suspensions will be implemented no sooner than the first payroll of the month following the change. Please remember to check your paystub to confirm your selected contributions are accurately reflected and being processed

* Check with your employer on whether your plan offers deferrals in percentages, dollar amounts or both.

** May not be offered by your plan. Roth contributions are made on an after-tax basis.

*** Employee Mandatory Contribution (401(a) only) is a one time election stated in the Plan Document. This is irrevocable and must be made before the participant's first entry date.

Beneficiary Designation

☐ Check here if this is a change of beneficiary. (Beneficiaries listed below replace any prior designation)
PLEASE NOTE: Percentage split must total 100% for each category of beneficiary.
If additional space for beneficiaries is required, attach additional sheets and mark this box: ☐

Primary Beneficiary(ies) (must total 100%):

Name	Relationship	Social Security #	Phone #
Address		Date of Birth	% Split

Name	Relationship	Social Security #	Phone #
Address		Date of Birth	% Split

Contingent Beneficiary(ies) (must total 100%): **Total = 100%**

Name	Relationship	Social Security #	Phone #
Address		Date of Birth	% Split

Name	Relationship	Social Security #	Phone #
Address		Date of Birth	% Split

Total = 100%

Funding Options

Pre-tax and Roth contributions will use the same investment options and allocation. If you wish to have different selections, contact a Customer Service Representative at 1-877-677-3678.

Nationwide® Target Destination Series

____________% Nationwide® Destination 2015 Fund (Institutional Service Class)
____________% Nationwide® Destination 2020 Fund (Institutional Service Class)
____________% Nationwide® Destination 2025 Fund (Institutional Service Class)
____________% Nationwide® Destination 2030 Fund (Institutional Service Class)
____________% Nationwide® Destination 2035 Fund (Institutional Service Class)
____________% Nationwide® Destination 2040 Fund (Institutional Service Class)
____________% Nationwide® Destination 2045 Fund (Institutional Service Class)
____________% Nationwide® Destination 2050 Fund (Institutional Service Class)
____________% Nationwide® Destination 2055 Fund (Institutional Service Class)
____________% Nationwide® Retirement Income Fund (Institutional Service Class)

Nationwide® Investor Destinations Series

____________% Nationwide® Investor Destinations Aggressive Fund (Service Class)
____________% Nationwide® Investor Destinations Moderate Aggressive Fund (Service Class)
____________% Nationwide® Investor Destinations Moderate Fund (Service Class)
____________% Nationwide® Investor Destinations Moderate Conservative Fund (Service Class)
____________% Nationwide® Investor Destinations Conservative Fund (Service Class)

International

____________% American Century International Discovery Fund (Investor Class)[4]
____________% Invesco International Growth Fund (Class R5)[4]
____________% MFS International Value Fund (Class R3)[4]
____________% Nationwide® International Index Fund (Class A)
____________% Oppenheimer Global Fund (Class A)

Small Cap

____________% Brown Capital Mgmt. Small Company Fund (The) (Investor Class)
____________% Nationwide® Variable Insurance Trust: Nationwide Multi-Manager NVIT Small Company Fund (Class 1)
____________% Nationwide® Small Cap Index Fund (Class A)
____________% Nationwide® Small Company Growth Fund (Institutional Service Class)

Small Cap (Continued)

____________% Nationwide® U.S. Small Cap Value Fund (Institutional Service Class)

Mid Cap

____________% American Century Vista Fund (Investor Class)[4]
____________% American Funds-The Growth Fund of America[2] (Class A)
____________% JP Morgan Mid Cap Value Fund (Class A)
____________% Nationwide® Diverse Managers Fund (Institutional Service Class)
____________% Nationwide® Mid Cap Market Index Fund (Class A)
____________% Neuberger Berman Equity Funds ® - Genesis Fund (Trust Class)
____________% Wells Fargo Advantage Funds - Discovery Fund (Administrator Class)[4]

Large Cap

____________% American Century Growth Fund[3] (Investor Class)
____________% American Century Value Fund (Investor Class)
____________% Dreyfus Appreciation Fund Inc.
____________% Dreyfus S&P 500 Index Fund[3]
____________% Fidelity Contrafund[1, 2]
____________% Fidelity Equity-Income Fund[2]
____________% Nationwide® Fund (Institutional Service Class)
____________% Nationwide® Growth Fund (Institutional Service Class)
____________% Nationwide® Large Cap Growth Portfolio
____________% Nationwide® S&P 500 Index Fund (Institutional Service Class)
____________% Neuberger Berman Equity Trust Socially Responsive Fund (Investor Class)
____________% T. Rowe Price Growth Stock Fund (Advisor Class)
____________% INVESCO Growth & Income Fund (Class A)[4]

Balanced

____________% American Funds-The Income Fund of America[2]

Bonds

____________% MFS High Income Fund[2] (Class A)
____________% Nationwide® Bond Index Fund (Class A)
____________% Nationwide® HighMark Bond Fund (Institutional Service Class)
____________% PIMCO Total Return Fund (Class A)
____________% Waddell & Reed Advisor High Income Fund (Class Y)

Fixed/Cash

____________% Federated U.S. Government Securities Fund: 2-5 Years[2] (Institutional Shares)
____________% Nationwide® Money Market Fund (Prime Shares)
____________% Nationwide® Fixed Account
____________% Morley Stable Value Retirement Fund[3]

100% Total for both columns must equal 100%

1. Fidelity Contrafund is only available to plans that adopted the fund prior to July 1, 1998.
2. This fund is in the Passage Series and may not be available in your plan. Please contact the Public Sector Service Center at www.nrsforu.com or 1-877-NRS-FORU (1-877-677-3678) or your Local Retirement Specialist for details.
3. This fund is a non-annuity fund and may not be available in your plan. Please contact the Public Sector Service Center at www.nrsforu.com or 1-877-NRS-FORU (1-877-677-3678) or your Local Retirement Specialist for details.
4. This fund may not be available to your plan. Please contact the Public Sector Service Center at www.nrsforu.com or 1-877-NRS-FORU (1-877-677-3678) or your Local Retirement Specialist for details.

Authorization

☐ Please send me a copy of the Informational Brochure/Prospectus(es).
☐ Please contact me regarding transferring my other pre-tax retirement plans.
☐ Please send me forms regarding the Catch-Up Provision.

I authorize my Employer to make the contribution(s) to the Plan in the amounts I have designated above. The contribution(s) will continue until otherwise authorized in accordance with the Plan. The withholding of my contribution(s) amount by my Employer and its payment to the designated investment option(s) will be reflected in the first pay period contingent on the processing of this application by the Public Sector Service Center in conjunction with the set-up time required by my payroll center. The contribution(s) is to be allocated to the funding options in the percentages indicated above. I understand some investment options may impose a short-term trading fee. I understand I should read the fund prospectuses carefully.

I have read and understand the terms contained in this form, including the attached Memorandum of Understanding, which is incorporated herein.

I accept these terms and understand that these terms do not cover all the details of the Plan or products.

Participant Signature:	Date:
Retirement Specialist Name (Print):	Agent Number: