



# Your Guide to Retirement Savings

**Herringbone Digital 401(k) Plan**

Enrollment Guide

Powered by:



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# Congratulations!

Herringbone Digital is pleased to welcome you to the Herringbone Digital 401(k) Plan. The Plan is designed to help you save and invest for retirement. It's one way to thank you for contributing to our success.

This guide walks you through the enrollment process and the benefits of our Plan in particular. Starting your retirement planning today, offers more choices for your life tomorrow. There is no time like the present to get started!

## Your Next Steps:

1. Review this Enrollment Guide.
2. Enroll in our Plan by logging into our Plan's website, <https://www.pcsretirement.com/login>.



## We want to help!

If you have questions about your account or our Plan's website, please contact a service representative at (888) 621-5491. We are available 24 hours a day, 7 days a week, to assist you with your needs.

We hope that you will take full advantage of this important benefit.

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## About PCS, The Plan's Recordkeeper

Consistently recognized as one of the fastest growing independent record keepers in the country, PCS Retirement, LLC (PCS) was founded by tax and ERISA attorneys to provide sophisticated retirement programs for the corporate, professional and governmental markets. PCS is a conflict-free independent retirement plan platform, offering a vast menu of investments free from proprietary funds and conflicts of interest. PCS has consistently made the Inc. 5000 list of fastest growing privately held companies. PCS was awarded a "AAA" rating from Roland|Criss for Superior Quality Management System and Strongest Fiduciary Support Safety!\* PCS is also certified by CEFEX (The Centre for Fiduciary Excellence) as adhering to the American Society of Pension Professionals & Actuaries' (ASPPA) standard of practice for recordkeepers.\*



\*Certified in 2023

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# Getting Started is Easy!

## Step 1: Register

Go to <https://www.pcsretirement.com/login> and select **Register for web** access to set up online access. You will need your social security number, legal last name, date of birth, and current zip code.

### Your Account Security is important to us!

To safeguard your personal information, we use Multi-factor Authentication (MFA) for increased account security. With MFA, we periodically send a OneTime PIN to your mobile phone, or email.

## Step 2: Enroll

### Make your retirement plan choices:

- **Update Personal Information:**  
Make sure your personal and contact information is correct.
- **Add Beneficiaries:**  
Choose who will inherit your account balance.
- **Set Your Contribution:**  
Decide how much of your paycheck to contribute to your retirement plan.
- **Choose Investments:**  
Select how you want your contributions to be invested.

## Step 3: Confirm

### Review all your entries:

- Make sure everything looks correct.
- Complete your enrollment.

# Getting Started is Easy!

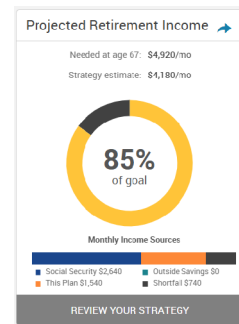
**We give you the tools and support you need to be ready for retirement.**

**Need help determining if you're on track for retirement?**

Find out with our RetireOnTime™ powered by iJoin retirement readiness tool!

## RetireOnTime™ powered by iJoin

RetireOnTime™ powered by iJoin uses real-time individual data—such as age, income, and current savings—to project a personalized retirement income goal. It provides actionable recommendations and visuals to help participants understand how much they may need in retirement, whether they're on track, and what steps can improve their outlook.



## Want to consolidate retirement accounts?

Try our Rollover Wizard!

Our Rollover Wizard makes consolidation easy! After logging on to <https://www.pcsretirement.com/login>, simply click "Rollover Contributions", found under the Account Transactions tab, to get started!

Rollover Contribution

Hello Rocky,

Welcome to the PCS Rollover Contribution Wizard.

This wizard is designed to assist you in consolidating your qualified retirement accounts in one place. Before you get started, please confirm your email address.

Email Address:

Confirm Email Address:

What type of account are you interested in rolling over? (Select One)

**CONTINUE**

I'm enrolled in the Plan.  
Now what?

**Now that you're enrolled,  
learn the benefits of contributing.**

Being enrolled into the plan is just the first step toward being ready for retirement. The following pages will show you the benefits of regularly contributing to your plan, including tax savings and compound growth.



# Retirement Plan Basics

## Participating in the Plan offers you the potential to pay less in taxes.

- Your contributions may lower your taxable income, and may even put you in a lower tax bracket.
- Assets in your account can grow tax deferred.
- If your plan allows for Roth contributions and you elect this option, you won't get an up front tax-deduction but your account (both contributions and earnings) can grow tax-free and withdrawals taken during retirement are not subject to income tax once you are 59-1/2 and you have held the account for five years or more.

Contributions to your retirement plan can reduce your taxable income, and may lower your current federal income taxes.

### Here's an example:

Bob is single and earns an annual income of \$40,000. He contributes \$200/month to his retirement plan. Bob will pay \$578 less in federal income taxes than if he did not contribute to his retirement plan!

		Bob's Federal Tax*
Bob's taxable income before contributing:	\$40,000	\$6,754
Annual pre-tax contributions (\$200 x 12):	\$2,400	
Bob's taxable income after contributing:	\$37,600	\$6,176

\*Based on 2021 tax rates.

## Enjoy federal tax savings on your contributions.

The table below shows you the estimated federal tax savings based on a 6% contribution rate for different income levels.

Taxable Income	% of Annual Income	Monthly Contributions	Annual Contributions	Tax Savings
\$15,000	6%	\$75	\$900	\$133
\$20,000	6%	\$100	\$1,200	\$178
\$30,000	6%	\$150	\$1,800	\$268
\$40,000	6%	\$200	\$2,400	\$578
\$50,000	6%	\$250	\$3,000	\$728
\$60,000	6%	\$300	\$3,600	\$878
\$70,000	6%	\$350	\$4,200	\$1,028
\$80,000	6%	\$400	\$4,800	\$1,178



See how much you can save!

# Retirement Plan Basics (continued)

## Compounding earnings will help your savings grow.

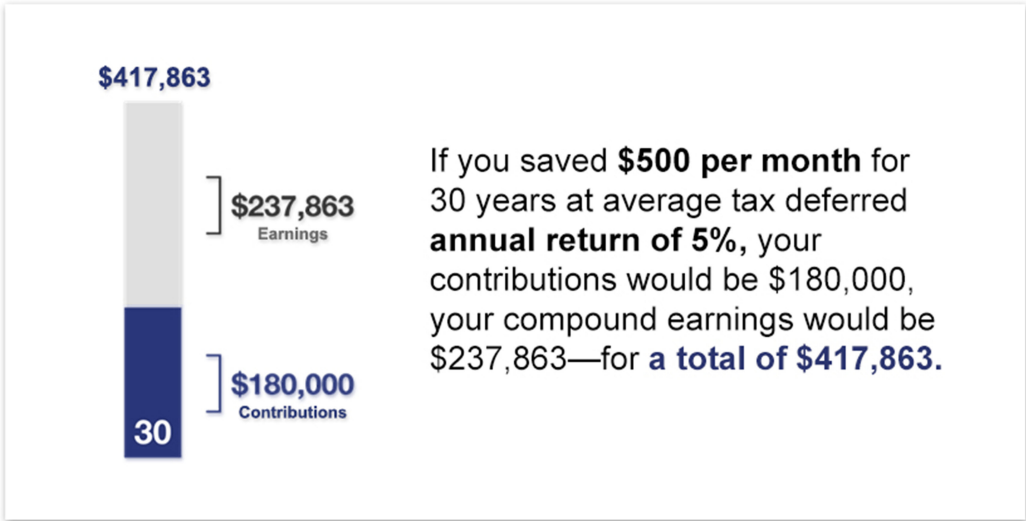
Earnings on investments in your account also grow tax-deferred until you begin taking withdrawals, thus compounding your account's growth over time.

The value of \$1,000 compounded at various rates of return over time as follows:

Years	4%	6%	8%	10%
10	\$1,481	\$1,791	\$2,159	\$2,594
20	\$2,191	\$3,207	\$4,661	\$6,728
30	\$3,243	\$5,743	\$10,063	\$17,449

## Example

If Lisa saved \$500/month for 30 years, and earned an average tax-deferred annual return of 5% she would end up with \$417,863. Lisa's contributions would be \$180,000 and the rest of her account – \$237,863 – would be compounded earnings.



# Retirement Plan Basics (continued)

**Why you need to start saving today.**

**Everyone dreams of a retirement free from financial worries. In spite of what you may hear, a financially secure retirement is possible, but proper planning and preparation are essential.**

It's a fact - the earlier you begin saving, the better off you'll be when you retire. One thing is for sure, retirement plans don't work unless you take advantage of them. So start saving today!

Try to divert as much of your earnings into savings as you can. If you don't have a budget, create one. If you do have a budget, revise it to reflect your new commitment to saving, as well as any recent changes in your spending. Chip away at wasteful habits such as expensive dinners or unused gym memberships.

## **More great reasons to join the plan:**

### **Cut your taxes.**

Remember that your retirement plan contributions are tax-deferred, which means you don't pay taxes on the money in your account until you take it out — usually, when you're retired and possibly in a lower tax bracket.

### **Invest automatically.**

Your contributions are deducted right from your paycheck and go directly into your account before taxes are withheld — so you may barely miss the money.

### **Get more bang for your buck.**

If you contribute the same amount of money regularly, you're using an investment strategy called "dollar cost averaging."

This method averages out the price you pay for the investments in your account, so you're buying more when the price is lower and less when the price is higher — giving you better buying power. Compound earnings will help your savings grow.

### **Portability.**

Your savings continue to grow tax-deferred when you retire or leave the Plan.

### **Sophisticated investment support.**

When you join the plan, you gain access to the support of the plan's financial advisor who can help you to learn about the investments that are available to you.



# Retirement Plan Basics (continued)

## Why you need to start saving today.

### 1 Not Participating

Did you know that 21% of those eligible don't contribute to their retirement plan.<sup>1</sup> Are you one of them?

OUR SUGGESTION. Get started with small contributions. Worried that you can't afford it? You might be surprised about how little it takes since contributions are made on a pre-tax basis. Participating may have less of an impact on your take home pay than putting money into a traditional savings account.

### 2 No Planned Savings Goal

Without a plan, you run the risk of not having enough to support your desired lifestyle when you retire, or you may even outlive your retirement assets. To have the retirement of your dreams, take time to understand your retirement goals and develop a plan to achieve them.

OUR SUGGESTION. Create a plan. Even if you already contribute to the retirement plan, you might not be contributing enough to achieve your goals. We can help! Log onto the Plan's website and click on RetireOnTime™ under Learning Center to evaluate different scenarios to help you achieve your retirement goals.

### 3 Poor Diversification

Ever heard of asset allocation? That simply means looking at your age, risk tolerance and goals to determine the mixture of stocks, bonds and cash for your portfolio. Asset allocation can help you diminish investment risk, but keep in mind that you may need to rebalance your portfolio periodically in response to changing needs and investment performance. Keep in mind, asset allocation doesn't assure a profit and doesn't protect against loss.

OUR SUGGESTION. Diversify. Fortunately, the Plan offers 29 investment options designed to offer diversification across multiple asset classes. The investment lineup is carefully constructed and monitored by CBIZ Benefits & Insurance Services, Inc..

### 4 Chasing Performance

Some investors make the mistake of chasing investments in the latest "hot" sector. This is a race they're bound to lose. If you're thinking of joining the chase, remember that research shows that asset allocation determines more than 90% of the long-term return of a portfolio.<sup>2</sup>

OUR SUGGESTION. Consider a fund(s) from the carefully selected investment lineup constructed under the watchful eye of CBIZ Benefits & Insurance Services, Inc.. Keep looking at the long term. Review your investments at least once per year to make sure it is aligned with investment objectives and to help you determine if you need to make adjustments.

### 5 Cashing in Before Retirement

Many people cash out their retirement plan when they change jobs. It's not worth it. This can cause the money to lose its tax-deferred status and subject it to income taxes and a possible early withdrawal penalty — all of which means having less money for retirement.

OUR SUGGESTION. One option among many to consider is rolling your other retirement accounts into this plan. By combining your accounts you have the ability to view all account activity in one place, receive only one statement, preserve the tax-deferred status of the investments and potentially more easily manage and diversify your assets.

<sup>1</sup> Source: PSCA's Annual Survey of Profit Sharing and 401(k) Plans, 2014.

<sup>2</sup> Source: Brinson, Hood, and Beebower (1986); Brinson, Singer, and Beebower (1991).

# Retirement Needs

## How much do I still need to save?

### Determine how much money you will need to contribute to reach your retirement savings goal.

It's important to make realistic estimates about what kind of expenses you will have in retirement. Many experts\* believe financial security in retirement requires you replacing 60%-80% of your current annual income, adjusted for inflation.

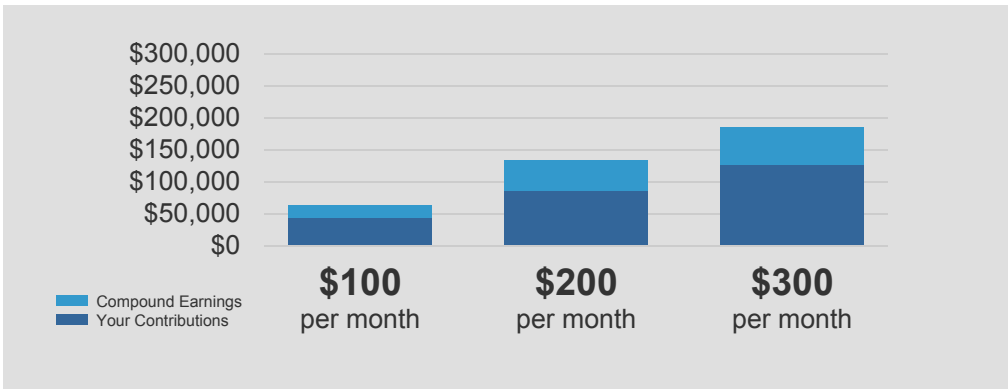
One way to begin estimating your retirement costs is to take a close look at your current expenses in various categories, and then estimate how they will change. For example, your mortgage might be paid off by then, but keep in mind that your health care costs are likely to rise.

"If I can save more, should I?" If you were to speak to a financial advisor, "As much as you can" is the standard answer. Many financial planners recommend that you save 10% to 15% of your income for retirement, starting in your 20's. But that's just a general guideline.

### How much you will need at retirement depends on you:

- At what age do you intend to retire?
- What type of lifestyle do you intend to live? (Will your spending really go down?)
- Are you married or single?
- Will you have dependents? (For example, helping with your grandchildren's education?)

### Example: 25 years of investing different dollar amounts:



*This calculation assumes an annual return of 5%. Past performance is not a guarantee of future results.*

\*Source: Social Security Administration, Social Security Basic Facts, 2022.

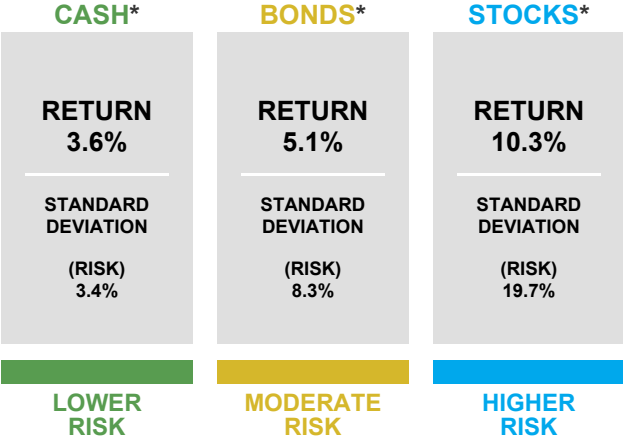
# Risk Profile: Choosing the Right Path

## How should I invest my retirement savings?

The Plan has a number of investment options from which you can choose to invest your retirement savings. These include model portfolios and individual mutual funds. Detailed information is contained in this guide. Review it very carefully and consult the Plan's financial advisor if you have any questions before you invest.

Choosing the right asset allocation is imperative when building your investment strategy. Focusing on asset allocation means determining how you will divide your portfolio among different asset classes:

## Historic risk and return of 3 different types of investments:



## Why diversify your portfolio?

Diversifying your portfolio means owning different types of investments. The idea is to balance your money among different asset classes to help reduce risk (measured by volatility or value fluctuation) in your investment portfolio.

Standard deviation is a statistical measure of the historic volatility of a mutual fund or portfolio. More generally, it is a measure of the extent to which numbers are spread around their average. The wider the dispersion, the larger the standard deviation.

\*Data provided for the period from 1926-2021 by Center of Research Security Pricing. Cash represented by 1-month TBills; Bonds represented by 5 Year Treasury; Stocks represented by S&P 500 stocks. **Past performance is not a guarantee of future results.** For hypothetical illustration only. Diversification does not guarantee a profit or protect against loss.

# Risk Profile: Choosing the Right Path

## Build your own portfolio do-it-yourself retirement planning.

Are you the type of person who wants to be actively involved in the research, selection and management of your retirement account? If that is the case, constructing your own portfolio mix from the available funds and handling the asset allocation yourself may be for you.

### The Plan offers the following individual funds:

Fund Name	Symbol	Category Name
AB Large Cap Growth Z	APGZX	Large Growth
Allspring Special Mid Cap Value R6	WFPRX	Mid-Cap Value
BlackRock Mid-Cap Growth Equity Instl	CMGIX	Mid-Cap Growth
Cohen & Steers Instl Realty Shares	CSRIX	Real Estate
FullerThaler Behavioral Sm-Cp Eq R6	FTHFX	Small Blend
JPMorgan Emerging Markets Equity R6	JEMWX	Diversified Emerging Mkts
JPMorgan Equity Income R6	OIEJX	Large Value
JPMorgan Income R6	JMSFX	Multisector Bond
Oakmark Investor	OAKMX	Large Value
Parnassus Core Equity Institutional	PRILX	Large Blend
Schwab 1000 Index®	SNXFX	Large Blend
Schwab Bank Savings	RBS1CSBS	Money Market-Tax-Free
Schwab International Index	SWISX	Foreign Large Blend
Schwab Target 2010 Index	SWYAX	Target-Date 2000-2010
Schwab Target 2025 Index	SWYDX	Target-Date 2025
Schwab Target 2030 Index	SWYEX	Target-Date 2030
Schwab Target 2035 Index	SWYFX	Target-Date 2035
Schwab Target 2040 Index	SWYGX	Target-Date 2040
Schwab Target 2045 Index	SWYHX	Target-Date 2045
Schwab Target 2050 Index	SWYMX	Target-Date 2050
Schwab Target 2055 Index	SWYJX	Target-Date 2055
Schwab Target 2060 Index	SWYNX	Target-Date 2060
Schwab Target 2065 Index	SWYOX	Target-Date 2065+
Schwab US Aggregate Bond Index	SWAGX	Intermediate Core Bond
Schwab® S&P 500 Index	SWPPX	Large Blend
TCW MetWest Total Return Bd M	MWTRX	Intermediate Core-Plus Bond
Vanguard Explorer Adm	VEXRX	Small Growth
Vanguard Mid Cap Index Admiral	VIMAX	Mid-Cap Blend
Vanguard Small Cap Index Admiral Shares	VSMAX	Small Blend

*Please consider the investment objectives, risks, fees, and expenses carefully before investing. For this and other important information about investments offered through your Plan, you may obtain prospectuses for registered investment company choices and/or disclosure documents from the participant website or from your Plan's advisor. Read them carefully before investing.*

# Risk Profile: Choosing the Right Path

## What if I don't choose an investment option?

If you do not choose a specific investment, your savings will be invested in the Plan's default investment fund.

### **Remember - Your investments should:**

1. Reflect the level of risk you can tolerate.
2. Fit with your investment time frame.
3. Have investment objectives that match your own.

For information on each investment's objectives and goals, please refer to the investment's fact sheet and prospectus.

**Starting to save for retirement is easy, and possibly the best thing you can do for your financial future.**

# Important Notices

Please review the following information and retain it for your future reference.

# Forms

The following forms and worksheets are for your convenience.

Please feel free to contact Participant Services at (888) 621-5491 if you need assistance.

# Hennessey Group Inc, Retirement Plan

## Investment Election Worksheet

This worksheet contains a list of your Plan's investment options. Additional information regarding each option, including internal expenses, past performance and short-term redemption fees, can be found online at <https://www.pcsretirement.com/login>. Once you have determined your investment elections, please log into the Plan's website <https://www.pcsretirement.com/login> to record your elections.

Please note all investment elections and investment election changes must be made through the website or by contacting a Participant Services Representative at (888) 621-5491.

### INDIVIDUAL FUNDS

_____ %	AB Large Cap Growth Z (APGZX)	_____ %	Allspring Special Mid Cap Value R6 (WFPRX)
_____ %	BlackRock Mid-Cap Growth Equity Instl (CMGIX)	_____ %	Cohen & Steers Instl Realty Shares (CSRIX)
_____ %	FullerThaler Behavioral Sm-Cp Eq R6 (FTHFX)	_____ %	JPMorgan Emerging Markets Equity R6 (JEMWX)
_____ %	Oakmark Investor (OAKMX)	_____ %	Parnassus Core Equity Institutional (PRILX)
_____ %	JPMorgan Equity Income R6 (OIEJX)	_____ %	JPMorgan Income R6 (JMSFX)
_____ %	Schwab 1000 Index® (SNXFX)	_____ %	Schwab Bank Savings (RBS1CSBS)
_____ %	Schwab International Index (SWISX)	_____ %	Schwab Target 2010 Index (SWYAX)
_____ %	Schwab® S&P 500 Index (SWPPX)	_____ %	TCW MetWest Total Return Bd M (MWTRX)
_____ %	Schwab Target 2025 Index (SWYDX)	_____ %	Schwab Target 2030 Index (SWYEX)
_____ %	Schwab Target 2035 Index (SWYFX)	_____ %	Schwab Target 2040 Index (SWYGX)
_____ %	Schwab Target 2045 Index (SWYHX)	_____ %	Schwab Target 2050 Index (SWYMX)
_____ %	Schwab Target 2055 Index (SWYJX)	_____ %	Schwab Target 2060 Index (SWYNX)
_____ %	Schwab Target 2065 Index (SWYOX)	_____ %	Schwab US Aggregate Bond Index (SWAGX)
_____ %	Vanguard Explorer Adm (VEXRX)	_____ %	Vanguard Mid Cap Index Admiral (VIMAX)
_____ %	Vanguard Small Cap Index Admiral Shares (VSMAX)		

\_\_\_\_\_ % Total (Individual Funds)

You may elect any combination of Individual Funds as long as each investment election is at least 5.00% of your account and are in increments of 1.00%.

# Contribution Election Worksheet

This worksheet contains the amount and type of the contribution you would like to change. Once you have determined how you would like to change your contribution, please log into the Plan's website <https://www.pcsretirement.com/login> to record your changes.

Please note all contribution election changes must be made through the website or by contacting a Participant Services Representative at (888) 621-5491.

## Change of Contribution Election Amount

Please change my contribution election to the Plan to the following amount as of the earliest possible date:

Traditional 401(k) contribution: \$ \_\_\_\_\_ or \_\_\_\_\_ % (as allowed by plan) on a pre-tax basis. I understand that my salary reduction amount will be made directly to the Plan before federal income tax is withheld and will be subject to the provisions of Internal Revenue Code Section 401(k).

Roth (after tax contribution): \$ \_\_\_\_\_ or \_\_\_\_\_ % (as allowed by plan) on an after-tax basis. I understand that the amount specified above is a non-deductible, after-tax contribution and will be subject to the 5 year holding period requirement as well as the provisions of Internal Revenue Code 401(k).

I understand that I may change my rate of contributions in accordance with the terms of the Plan.

Catch-Up Contribution: I will be age 50 or older by the end of this calendar year. In addition to the regular contribution election specified above, I also elect to make catchup deferral contributions of \$ \_\_\_\_\_ or \_\_\_\_\_ % (as allowed by plan) on a pre-tax traditional basis or an after-tax Roth basis.  traditional or  an after-tax basis Roth.

# Beneficiary Designation Worksheet

This worksheet contains a list of your primary and contingent beneficiary(ies). Once you have determined who you would like to designate as your beneficiary(ies), please log into the Plan's website <https://www.pcsretirement.com/login> to record your designations.

Please note all beneficiary designation changes must be made through the website or by contacting a Participant Services Representative at (888) 621-5491.

## Primary Beneficiary(ies)

I hereby designate the following as my primary beneficiary(ies) to receive any death benefits, payable as a result of my death, in accordance with the provisions of my employer's retirement plan ("the Plan"):

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_ Ext: \_\_\_\_\_  
Relationship: \_\_\_\_\_ Percentage Share: \_\_\_\_\_ %

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_ Ext: \_\_\_\_\_  
Relationship: \_\_\_\_\_ Percentage Share: \_\_\_\_\_ %

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_ Ext: \_\_\_\_\_  
Relationship: \_\_\_\_\_ Percentage Share: \_\_\_\_\_ %

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_ Ext: \_\_\_\_\_  
Relationship: \_\_\_\_\_ Percentage Share: \_\_\_\_\_ %

## Contingent Beneficiary(ies)

In the event my primary beneficiary(ies) should predecease me or die prior to the complete distribution of benefits from the Plan, I designate the following as my contingent beneficiary(ies):

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_ Ext: \_\_\_\_\_  
Relationship: \_\_\_\_\_ Percentage Share: \_\_\_\_\_ %

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_ Ext: \_\_\_\_\_  
Relationship: \_\_\_\_\_ Percentage Share: \_\_\_\_\_ %

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_ Ext: \_\_\_\_\_  
Relationship: \_\_\_\_\_ Percentage Share: \_\_\_\_\_ %

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_ Ext: \_\_\_\_\_  
Relationship: \_\_\_\_\_ Percentage Share: \_\_\_\_\_ %