



## Personal Information Change Request Governmental 457(b) Plan

Use black or blue ink when completing this form. For questions regarding this form, visit the website at [empowermyretirement.com](http://empowermyretirement.com) or contact Service Provider at 1-800-701-8255.

### City of Billings 457(b) Deferred Compensation Plan

781269-01

#### A Participant Information (Provide Name, Social Security Number and Date of Birth as it currently appears on the account)

Account extension identifies funds transferred to a beneficiary due to death, alternate payee due to divorce or a participant with multiple accounts.

Account Extension

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U.S. Social Security/U.S. Taxpayer Identification Number  
(Must provide all 9 digits)

Last Name

First Name

M.I.

Date of Birth

(The name provided MUST match the name on file with Service Provider.)

I have a retirement savings account with a previous employer or an IRA. ☐ Yes or ☐ No

I would like help consolidating my other retirement accounts into my account with Empower.\* ☐ Yes, I would like a representative to call me at phone # \_\_\_\_\_ to review my options and assist me with the process. The best time to call is \_\_\_\_\_ to \_\_\_\_\_ A.M./P.M. (circle one - available 6 a.m. to 8 p.m. Mountain time). \*Rollovers are subject to my Plan's provisions.

#### B Name Change (Attach a copy of birth certificate, divorce decree, marriage certificate, military ID, passport or court order)

Last Name

First Name

M.I.

#### Address Change (Required for my signature to be notarized or witnessed in the section below.)

Street Address

City/State/Zip Code

#### Contact Information Change

( )

Home Phone Number

( )

Work Phone Number

Email Address

( )

Mobile Phone Number

#### Personal Information Change

Date of Birth \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (Attach a copy of Birth Certificate, Military ID, Passport or Driver's License)

Change of Status: ☐ Married ☐ Unmarried

Gender: ☐ Female ☐ Male ☐ Nonbinary ☐ Unspecified

#### Social Security Number Change (If I am still employed, I must obtain approval from my Employer)

Social Security Number \_\_\_\_\_ (Attach a signed copy of Social Security Card)

Last Name

First Name

M.I.

Social Security Number

Number

**C Signatures and Consent** *(Signatures must be on the lines provided.)***Participant Consent** *(Please sign on the 'Participant Signature' line below.)*

I affirm that the information I have provided on this form is true and correct.

Any person who presents a false or fraudulent claim is subject to criminal and civil penalties.

**Participant Signature** \_\_\_\_\_ **Date (Required)** \_\_\_\_\_**A handwritten signature is required on this form. An electronic signature will not be accepted and will result in a significant delay.****Signature Notarization** *(Required if requesting an Address Change. May also be witnessed in the Authorized Plan Administrator Signature section below.)**The date of your signature on this form above must match the date of the Notary Public signature on the separate jurat or notarial certificate or in this section below. If your notary completes a separate jurat or notarial certificate, you must still sign on the above signature line and enter the date on this form.***ATTENTION Notary Public:** Make sure that you have reviewed the notary requirements for your state. If your state requires a separate jurat or notarial certificate, please complete and attach to this request.**We require that the following information must be included on the separate jurat or notarial certificate:** (1) name of document being notarized; (2) the plan name; (3) the plan number; and (4) participant name. Separate jurat or notarial certificates submitted that do not include this information will be rejected and will delay the withdrawal request. If your state does require a separate jurat or notarial certificate and you complete the section below, this statement of notary will be rejected and will delay the withdrawal request.

If your state does not require a separate jurat or notarial certificate, you may complete the notary section below.

**Statement of Notary****NOTE: Notary seal must be visible.**This request was subscribed and sworn *(or affirmed)* to before me

State of \_\_\_\_\_) on this \_\_\_\_\_ day of \_\_\_\_\_, year \_\_\_\_\_, by \_\_\_\_\_

**SEAL**)ss. *(name of participant)* \_\_\_\_\_

County/Parish/Borough \_\_\_\_\_ proved to me on the basis of satisfactory evidence to be the person

of \_\_\_\_\_) who appeared before me.

Notary Public's signature \_\_\_\_\_ My commission expires \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**A handwritten signature is required on this form. An electronic signature will not be accepted and will result in a significant delay.**

Notary Public's full name \_\_\_\_\_ Telephone number \_\_\_\_\_

**Authorized Plan Administrator Signature** *(Required for Social Security Number changes or if witnessing Participant's signature for an Address Change.) (Please sign on the 'Authorized Plan Administrator Signature' line below.)*

I certify and accept that the information provided by the participant on this form is correct.

**If the participant has requested an address change and the participant's signature is not notarized, I have personal knowledge and hereby certify that this request was submitted and signed by the participant.****Authorized Plan Administrator Signature** \_\_\_\_\_ **Date (Required)** \_\_\_\_\_**A handwritten signature is required on this form. An electronic signature will not be accepted and will result in a significant delay.****Print Full Name** \_\_\_\_\_**D Delivery Instructions****After all signatures have been obtained, this form can be****Uploaded Electronically:****OR****Sent Regular Mail to:****OR****Sent Express Mail to:**

Login to account at

Empower

Empower

**empowermyretirement.com**

PO Box 56025

8515 E. Orchard Road

Click on Upload Documents to submit

Boston, MA 02205-6025

Greenwood Village, CO 80111

We will not accept hand delivered forms at Express Mail addresses.

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