



**Taylor Made Sales Agency, Inc. / Taylor Made Stallions, Inc.**  
**Human Resources Department**

2765 Union Mill Road  
Nicholasville, KY 40356  
Phone: 859-881-6114 / Fax: 859-881-7000

**Taylor Made 401K Plan Enrollment and Contribution Form**

**Eligibility Information**

Date of Birth:	Date of Hire:	Team Member Deferral Date:
Age as of Today:	One Year Anniversary Date (DOH):	TMSA Contributions Eligibility Date:

**Participant Information**

Name (First, Middle Last)	Social Security Number	Male <input type="checkbox"/> Female <input type="checkbox"/>
Address (number and street)	Home Phone	Cell Phone
City State Zip	Marital Status <input type="checkbox"/> Married <input type="checkbox"/> Single	

**Contribution Information**

Pre-Tax Contributions <input type="checkbox"/>	Yes, I want to contribute _____ % or \$ _____ of my compensation per pay period on a pre-tax basis.
Roth Contributions <input type="checkbox"/>	Your plan offers an After-Tax Roth 401K savings option. You may make a Roth contribution in addition to, or instead of, the other contribution options shown above, subject to IRS limits. Yes, I want to make a Roth contribution of _____ % or \$ _____ of my compensation per pay period on an after-tax basis.
Catch-Up Contributions <input type="checkbox"/>	The IRS allows participants age 50 or older to contribute up to an additional \$5,500 per year, as increased based on the Cost of Living Adjustment. Catch up contributions will be made on a pre-tax basis unless you indicate you want to contribute on a Roth basis by checking here: <input type="checkbox"/> Roth Yes, I want to make Catch-Up contribution of _____ % or \$ _____ of my compensation under the catch-up provision.
Waive Participation <input type="checkbox"/>	No, thank you. I do not want to participate in Taylor Made's retirement plan at this time. I am choosing not to save any compensation.

**BENEFICIARY DESIGNATION FORM MUST BE COMPLETED UPON SUBMISSION OF ELECTION**

All contributions will be effective at the first of month following your election. If you have any questions concerning your elections please notify Human Resources. You have the option to make changes to your contribution/election at any time; noting all changes will be effective at the first of the month following your new submission date of this form.

I understand the above contribution will be made effective as of the first of the month following the date of submission of this form. If I have chosen to waive participation it is clearly marked in the above box.

Signed: \_\_\_\_\_ Date of Submission: \_\_\_\_\_

**Taylor Made's 401K Plan is offered through:**  
**VOYA Life Insurance and Annuity Company**

Plan Number: 875700

P.O. Box 990063

Hartford, CT 06199-0063

Assistance by Phone: 1-800-584-6001 or website: [www.voyaretirementplans.com](http://www.voyaretirementplans.com)

The following is a worksheet to help you select where you want your funds to be invested. If you do not make a selection, your contributions will automatically enroll in the Target Date Funds (see option #2). For more information and to make your selection you may log onto [www.voyaretirementplans.com](http://www.voyaretirementplans.com) or to speak with an VOYA representative you may contact: 1-800-584-6001. For assistance in Spanish please contact 1-800-584-6001.

Please note if you are accessing your account online for the first time you will enter your social security number as your Personal Identification Number (PIN) and enter the two digit month and two digit year in which you were born as your default password. For example: January 1972 would be typed as 0172. You will then be asked to create a new User ID and password.

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## ONLINE SELECTIONS OR VIA PHONE

### Option 1: I Don't Want To Go It Alone: Hand Me To A Professional

Managed Accounts (Managed by Morningstar). I want investment experts to manage my plan investments.

Your plan offers Managed by Morningstar, a professional investment management service available through Morningstar Retirement Manager. The services and related fees are described in the Morningstar section of your enrollment materials.

Once you have enrolled, you can update your personal information through VOYA's participant Website. After you log on, click on Get Advice.

Selection of Managed by Morningstar program means you want to receive professional investment management and ongoing oversight of your retirement account.

Morningstar Associates can personalize your retirement strategy even further if you wish to provide salary information. Your annual salary is \$\_\_\_\_\_.

### Option 2: I Like To Keep It Simple: Give Me a Handy Solution

Target Date Funds - I want to invest in professionally managed funds that provide diversification.

To select a target date fund go to option four and enter 100% in the fund that tracks most closely with the year you plan to retire. The target date options are listed under Asset Allocation.

### Option 3: I've Got the Basics Covered: I'd Like a Helping Hand

VOYA Risk Based Solution Portfolios - I want to invest in professionally managed funds that provide diversification.

Select the VOYA Risk-Based Solution Portfolio that best suits your investment risk tolerance. I want to invest 100% of my contributions in the selected VOYA Risk Based Solution Portfolio.

	VOYA Solution AGGR GRWTH PORT SRV
	VOYA Solution CONSERVATIVE PORT SRV
	VOYA Solution GROWTH PORTFOLIO SRV
	VOYA Solution MODERATE PORTFOLIO SRV

### Option 4: I Want to Be in Control; I'll Keep It in My Hands

I want control. I will choose my own investment mix. I want to invest my contributions according to the allocations designated below. A maximum of 25 investment options may be selected. Use this section to select a percentage other than 100% for options previously listed.

## ROLLOVER

Do you want to learn more about the benefits of rolling over and consolidating your retirement investments? Contact VOYA's Transition Counseling today by calling 1-866-874-8432.



**Acknowledgements**

VOYA reserves the right to cancel your access to Managed by Morningstar service at any time without prior notice, including, but not limited to, as a result of any excessive trading restrictions imposed by VOYA or a Fund Company. Please refer to your contract prospectus, prospectus summary, or disclosure book for further information on the VOYA Excessive Trading Policy. A copy of this policy can also be found on the internet at [www.voyaretirementplans.com](http://www.voyaretirementplans.com). For additional information on a fund's excessive trading policy please refer to the fund's prospectus.

If I elect to participate in the Managed by Morningstar program, I hereby acknowledge that I have received and read the Managed by Morningstar program description and the Morningstar Overview, including the Morningstar Investment Advisory Agreement, and that I understand the Managed by Morningstar program description and the Agreement and agree to be bound by its terms. I understand that the applicable fees will be deducted periodically from my account.

Any person who knowingly presents a false or fraudulent claim for payment of loss or benefit or knowingly presents false information in an application for insurance may be guilty of a crime and may be subject to fines and confinement in prison.

One or more of these options may be offered through a custodial or trust arrangement and/or a group annuity or funding agreement issued by VOYA Life Insurance and Annuity Company. For investment options offered through a funding agreement or group annuity contract, I understand that the current tax laws provide for deferral or taxation on earnings on account balances; and that, although the funding agreement or group annuity contract provides features and benefits that may be of value, it does not provide for any additional deferral or taxation beyond that provided by the Plan itself.

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