



19 East 34th Street
New York, NY 10016
www.cpg.org

Lay Defined Benefit Retirement Plan Employee Application for Membership

Employer Information

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

Employee Information

Name _____

Address _____

City _____ State _____ Zip _____

Home Phone _____ Cell Phone _____ Email _____

Social Security # _____ Date of Birth _____ Gender Male Female Date of Hire _____

Proof required by copy of driver's license, passport, or birth certificate

Marital Status Single Married Date of Marriage *(proof required by copy of marriage certificate)*

Spouse's Name _____ Spouse's Date of Birth _____ Social Security # _____

Annual Compensation

\$ _____ \$ _____

Cash Salary Utilities Housing* Yes No Meals Yes No

*The value of housing is including in the employee's total compensation for assessment purposes. The amount assessed equals: (1) if housing is provided rent-free, 30% of the sum of cash salary and utilities, or (2) if both housing and meals are provided free-of-charge, 40% of the sum of cash salary and utilities.

Total \$ _____

Scheduled Hours (per year) _____ Exempt Non-Exempt

Note: A lay employee who previously worked for an Episcopal employer that did not participate in The Episcopal Church Lay Employees' Retirement Plan (the Lay DB Plan) may receive vesting credit for that period of service if the employee and/or the employer notifies The Church Pension Fund in writing of such employment. To be eligible, the lay employee must have worked at least 1,000 hours annually.

Employee's Signature _____ Date _____

Employer's Authorized Signature _____ Title _____ Date _____ Effective Date _____

Please sign, date and return this form to **The Church Pension Fund, 19 East 34th Street, New York, NY 10016, Attn: Pension Services.** If you have any questions, call us at **(866) 802-6333, Monday – Friday, 8:30AM – 8:00PM ET** (excluding holidays).

The Lay DB Plan is a qualified plan under Section 401 (a) of the Internal Revenue Code, but as a church plan, it is not subject to ERISA. An independent audit of the plan's financial condition is disclosed in the Church Pension Group Annual Report, which is located on our website at www.cpg.org. The Church Pension Fund, as sponsor of the Lay DB Plan, continues to monitor the funding status closely. Like many defined benefit plans, the Lay DB Plan currently is not fully funded. The Church Pension Fund retains the right to amend, terminate or modify the terms of the Lay DB Plan, including the employer assessment rate, without notice and for any reason.