Nationwide®
Retirement Solutions

NACo Participation Agreement, Payroll Deduction Authorization and Service Request for 457 and 401(a) Plans

Please note that the information provided on this Participation Agreement will supercede any prior information provided, such as allocations, contribution amounts, contribution types (except Mandatory Employee Contribution) and/or beneficiary information. The information provided on this participation agreement shall become effective on the date accepted by the Public Sector Service Center.

Personal Information

☐ Check here if this is a name change (proof of name change must be attached)

☐ Check here if this is a new address

Name	*Social Security Number*
Address	*Date of Birth*
City, State, & Zip Code	*Contact Phone Number*
Email Address	*Gender (circle one)* Male Female
457 Plan Name	*457 Plan ID*
401(a) Plan Name	*401(a) Plan ID*
Date of Hire	

Type of Request

☐ New ☐ Change ☐ Reinstatement

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.***

Contribution Summary & Payroll Frequency

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

***May not be offered by your plan. Roth contributions are made on an after-tax basis. Generally, contributions can start, increase or decrease no earlier than the first day of the month following the month this application is signed.**
****Employee Mandatory Contribution is a one time election stated in the Plan Document. This is irrevocable and must be made before the participant's first entry date.**

Start Contribution on:____________________

Payroll Frequency:

☐ Weekly (W)-52 ☐ Monthly (M)-12 ☐ Semi-Monthly (X)-24
☐ Bi-Weekly (Z)-26 ☐ Other____________________

Special Pay Period Ending Date

Start____________________ **Stop**____________________

# of pay periods________________

457 Catch-Up

☐ Yes, 3-year ☐ Yes, Age 50+ ☐ No

Normal Retirement Age________________

***You must complete the Catch-Up Worksheet in addition to this form.**

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 (i.e. primary and contingent), and must be in whole percentages. *If additional space for beneficiaries is required, attach additional sheets and mark this box:* ☐

☐ Primary ☐ Contingent	Beneficiary Name		Social Security Number	%Split
	Address		Date of Birth	Phone#
☐ Primary ☐ Contingent	Beneficiary Name		Social Security Number	%Split
	Address		Date of Birth	Phone#

Funding Options are on the next page

Funding Options

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

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

ASSET ALLOCATION - NATIONWIDE® TARGET DESTINATIONS 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)

ASSET ALLOCATION - NATIONWIDE® INVESTOR DESTINATION 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)[5]
- ________% Invesco International Growth Fund (Class R5)[5]
- ________% Nationwide® International Index Fund (Class A)
- ________% Nationwide® International Value Fund (Institutional Service Class)
- ________% Oppenheimer Global Fund (Class A)

SMALL CAP

- ________% Nationwide® U.S. Small Cap Value Fund (Institutional Service Class)
- ________% Brown Capital Mgmt. Small Company Fund[3] (The) (Investor Class)
- ________% Nationwide® Variable Insurance Trust: - Nationwide Multi-Manager NVIT Small Company Trust (Class 1)
- ________% Nationwide® Small Cap Index Fund (Class A)
- ________% Nationwide® Small Company Growth Fund (Institutional Service Class)

MID CAP

- ________% American Century Vista(SM) Fund Class A[5]
- ________% JP Morgan Mid Cap Value Fund (Class A)
- ________% Nationwide® Mid Cap Market Index Fund (Class A)
- ________% Neuberger Berman Equity Trust (R) - Genesis Fund (Trust Class)
- ________% Wells Fargo Advantage Funds - Discovery Fund (Administrator Class)[5]

LARGE CAP

- ________% American Century Growth Fund (Investor Class)
- ________% American Century Value Fund (Investor Class)
- ________% American Funds The Investment Company of America Fund (Class A)[1,3]
- ________% Dreyfus Appreciation Fund, Inc.
- ________% Edgar Lomax Value Fund
- ________% Fidelity Contrafund[2,3]
- ________% Fidelity Equity-Income Fund[3]
- ________% Fidelity OTC Portfolio[3]
- ________% 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 Socially Responsive Fund (Investor Class)
- ________% S&P 500 Index Fund (Class E)
- ________% T. Rowe Price Growth Stock Fund (Advisor Class)
- ________% Invesco Growth & Income Fund (Class A)[5]

BALANCED

- ________% Fidelity Puritan (R) Fund[3]

BONDS

- ________% MFS High Income Fund[4] (Class A)
- ________% Nationwide® Bond Index Fund (Class A)
- ________% PIMCO Total Return Fund (Class A)
- ________% Waddell & Reed Advisor High Yield Fund (Class Y)

FIXED/CASH

- ________% Federated U.S. Govt. Securities 2 - 5 yrs Trust (Institutional Shares)
- ________% Invesco Short Term Investment Trust Treasury Portfolio[3] (Institutional Class)
- ________% Morley Stable Value Retirement Fund[4]
- ________% Nationwide® Fixed Account
- ________% Nationwide® Money Market Fund (Prime Shares)

________% **Total for both columns must equal 100%**

AVAILABILITY OF LIFE INSURANCE OPTIONS AND OTHER INVESTMENT OPTIONS MAY VARY BY PLAN. IF AN ALLOCATION IS MADE TO A CLOSED OR UNAVAILABLE INVESTMENT OPTION, I AGREE THAT THE ALLOCATION WILL BE MADE TO THE DEFAULT OPTION, THE NATIONWIDE® MONEY MARKET FUND. IF THE TOTAL INVESTMENT OPTION ALLOCATION PERCENTAGE EQUALS LESS THAN 100%, I AGREE THAT THE DIFFERENCE WILL BE INVESTED IN THE DEFAULT OPTION, THE NATIONWIDE® MONEY MARKET FUND. IF THE TOTAL INVESTMENT OPTION PERCENTAGE IS GREATER THAN 100%, YOUR APPLICATION WILL BE RETURNED TO YOU AND NOT PROCESSED.

1. THE INVESTMENT COMPANY OF AMERICA FUNDS ARE ONLY AVAILABLE TO PLANS THAT ADOPTED THE FUNDS PRIOR TO JULY 1, 1994.
2. FIDELITY CONTRAFUND IS ONLY AVAILABLE TO PLANS THAT ADOPTED THE FUND PRIOR TO JULY 1, 1998.
3. 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.
4. 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.
5. THIS FUND 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.

Authorization

☐ Please send me a copy of the Informational Brochure/Prospectus(es).

☐ **Please contact me regarding transferring my other pre-tax retirement plans.**

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. Some mutual funds may impose a short-term trade fee. Please 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 therein. I accept these terms and understand that these terms do not cover all the details of the

Participant Signature _______________ *Date* _______________

Retirement Specialist Name/Signature _______________ *Agent Number* _______________

Please return your completed application to:

NATIONWIDE RETIREMENT SOLUTIONS
P O BOX 182797
COLUMBUS OH 43218-2797
Fax Number: 1-877-677-4329

The Memorandum of Understanding is on the following pages