

[Company Logo] - New Horizon Solutions

401(k) Enrollment Form

Employee Name: Jane Doe

Employee ID: 12345

Date: March 03, 2025

Address: 123 Main St, Springfield, IL 62701

Section 1 - Enrollment:

- Contribution Rate: 5% of salary
- Company Match: 100% up to 3%, 50% on next 2%
- Start Date: First paycheck after approval

Section 2 - Investment Options:

- Option 1: S&P 500 Index Fund (Moderate Risk)
- Option 2: Bond Fund (Low Risk)
- Option 3: International Equity (High Risk)
- Allocation: 60% Option 1, 30% Option 2, 10% Option 3

Section 3 - Vesting Schedule:

- 0% vested at hire
- 50% vested after 1 year
- 100% vested after 2 years

Section 4 - Additional Benefits:

- Loan Provision: Up to 50% of balance, max \$50,000
- Hardship Withdrawal: Available with HR approval
- Rollover: Accept from prior 401(k) plans

Section 5 - Signature:

- I agree to the terms and conditions.

- Signature: _____ Date: _____

Instructions:

- Submit to HR by March 10, 2025.
- Contact retirement@newhorizon.com for investment advice.
- Retain a copy for your records.