

## Custodian

TO BE COMPLETED BY CORALISLE		K _ _ _ _ - _ _ _ _	
Employer		DIV.CODE	ERID
Plan Name		PLANID	NOEE

### PART 1 MEMBER'S INFORMATION Please PRINT throughout.

First Name \_\_\_\_\_ Middle Initial(s) \_\_\_\_\_ Last Name \_\_\_\_\_

Employer \_\_\_\_\_

Gender  M  F Date of Birth MM/DD/YYYY Marital Status  Single  Married  Divorced  Widowed

Mailing Address \_\_\_\_\_ Cayman Islands

Physical Address \_\_\_\_\_ Cayman Islands

Personal E-mail Address \_\_\_\_\_  Driver's Licence or  Passport No. \_\_\_\_\_

Home Tel. No. \_\_\_\_\_ Cellular No. \_\_\_\_\_

### PART 2 AUTHORISATION

I hereby authorise my employer to deduct an additional \_\_\_\_\_ % or \$ \_\_\_\_\_ each month from my income **or**

I elect to pay voluntary contributions into the plan

as a fixed amount of \$ \_\_\_\_\_ **or**

by making a one time payment of \$ \_\_\_\_\_.

Effective Contribution Date MM/DD/YYYY

The agreed amount shall be forwarded as an AVC in addition to my mandatory contributions to Coralisle Pension Services Ltd.

I will notify my employer, with a copy to Coralisle Pension Services Ltd., in writing of any changes to this agreement or termination of this authorisation one month in advance.

I understand that my AVCs are not matched by my employer.

I authorise Coralisle Pension Services Ltd. to communicate this authorisation to my employer on my behalf.

### PART 3 YOUR INVESTMENT CHOICE

The Coralisle Pension product allows you to select one investment choice for your AVC. Please select one option below.

Keep my AVCs in the same investment choice as my Mandatory Contributions (you do not need to complete A or B)

I wish to invest my AVCs in an alternate investment choice from my mandatory contributions (complete either A or B)

#### A. RISK PROFILE Choosing an investment strategy.

Select one Risk Profile for your AVCs. The Risk Profiles are rebalanced regularly. Refer to the Employee Booklet for fund allocation.

RISK PROFILE	VOLUNTARY CONTRIBUTIONS
Aggressive	<input type="checkbox"/>
Moderate	<input type="checkbox"/>
Conservative	<input type="checkbox"/>

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### B. SELF-DIRECTED Choosing your own investment mix.

Choose a maximum of five (5) funds in multiples of 5% totalling 100%. Refer to the Employee Booklet or [www.CGCoralisle.com](http://www.CGCoralisle.com) for fund details.

ASSET CLASS	INVESTMENT MANAGER/FUND	FUND CODE	VOLUNTARY CONTRIBUTIONS
Global Equities (Active)	MFS Global Equity Fund	GLEQU	
Global Equities (Index)	Vanguard Global Stock Index Fund	GLEQI	
US Equities (Active)	Vanguard US Opportunities Fund	USEQU	
US Equities (Index)	Vanguard S&P500 Index Fund	USEQI	
US Small Cap Equities	Blackrock iShare Russell 2000 - ETF	USEMG	
European Equities (Active)	Fidelity European Equity Fund	EUEQU	
European Equities (Index)	Blackrock iShare MSCI EAFE Index	EUEQI	
Asian Equities	Fidelity Asia Focus Fund	SEAEQ	
Global Bonds	Morgan Stanley Global Bond Fund	GLBON	
US Bonds	MFS US Government Bond Fund	USBON	
Balanced	Fidelity Growth & Income Fund	BALAN	
Short-term Option	CGI Core Liquidity Fund	CGICL	
	TOTAL		100%

**Please Note** If your investment choice for your voluntary contribution is incomplete, those contributions once received will be invested in the options you selected for your mandatory employee contributions.

Member's Signature \_\_\_\_\_ Date MM/DD/YYYY

**British Caymanian Insurance Agencies Limited** BritCay House, 236 Eastern Ave, George Town, Grand Cayman, Cayman Islands  
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Pensions and Employee Benefits

**INSURANCE | HEALTH | PENSIONS | LIFE**

A member of Coralisle Group Ltd.

Rev. 08-20

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