



**Yeshiva University Basic Plan – Plan 84990
Instructions and Enrollment Form**

Instructions

You should use this form if you are enrolling in the plan for the first time. Keep a copy of this form for your records and return the original to your Yeshiva University Benefits Office.

The Plan offers you the option of enrolling in a variety of mutual funds, fixed annuities and target-date life cycle funds. The Fidelity Freedom® Index Funds are an easy way to help ensure that you're investing responsibly. You pick a fund based on the approximate year you plan to retire. And you get a target retirement date investment mix of stocks, bonds, and short-term investments that's adjusted by professional fund managers to become more conservative over time — making it easy to stay on track to help you reach your future financial goals. The funds assume a retirement age of 65. You may choose a retirement age and date earlier or later than age 65, depending on your own situation.

You can review the investment options available under the Yeshiva University Basic Plan in more detail by logging into Fidelity NetBenefits® through the

| Date of Birth From | Date of Birth To | Freedom Fund Code | | Date of Birth From | Date of Birth To | Freedom Fund Code |
|-------------------------------|-----------------------------|------------------------------|--|-------------------------------|-----------------------------|------------------------------|
| 1900 | 1937 | 2764 | | | | |
| | | 2765 | | 1973 | 1977 | 2772 |
| 1943 | 1947 | 2766 | | 1978 | 1982 | 2773 |
| 1948 | 1952 | 2767 | | 1983 | 1987 | 2774 |
| 1953 | 1957 | 2768 | | 1988 | 1992 | 2775 |
| 1958 | 1962 | 2769 | | 1993 | 1997 | 2776 |
| 1963 | 1967 | 2770 | | 1998 | 2099 | 3427 |

**Basic Plan – Plan 84990
 Statement and Enrollment Form**

Participant: _____

State: _____ Zip: _____

Single Married Divorced

Please carefully consider the investment

www.netbenefits.com [REDACTED]

and the variable annuity prospectus, or other materials, before you invest.

1
2
3
4
5
6
7

| Percent Allocated | | | |
|-------------------|--|--|---|
| | | | % |
| | | | |
| | | | % |
| | | | % |
| | | | % |
| | | | % |

0384 | Fidelity International Index Fund

0384 | Fidelity® Small Cap Discovery Fund

%