

# Adventist Retirement Plan Locally Funded Employee Policy Transmittal Form for "Roll-out Date"

**Instructions:** Please complete this form and forward to the Adventist Retirement Plan by emailing Beth Roberts at [beth.roberts@nad.adventist.org](mailto:beth.roberts@nad.adventist.org) or faxing to her attention at FAX 301-680-6190.

**Purpose:** The purpose of this Transmittal Form is to notify the Retirement Plan of your "Roll-out Date" which is the date on which you will FIRST be sending through a payroll file fully converted to the new 2011 Locally Funded Policy. The Plan should already have received a copy of your Resolution Document and governing body action selecting a benefits option.

It is not required that this first payroll file include ALL locally-run payroll employees currently paid at off-site payrolls (such as elementary school or local church). See timeline below. However, it is required that all employees within the payroll file be consistently reported under the 2011 Policy and that all future payroll files submitted by your organization be consistently reported under the 2011 Policy. You may, if needed, add in locally-run payroll employees on future payrolls (see green bars on timeline below); however, many employers may not require this phase-in period and may be able to submit all locally-run payroll employees in the first "Roll-out Date" file.

Upon receipt of this Transmittal Form, the Plan will set the database filters to allow an incoming file from your organization under the 2011 Policy.

Your Roll-Out Date \_\_\_\_\_ (after 1/1/12 and before 12/31/13)

Organization Name \_\_\_\_\_

Your Name (Printed) \_\_\_\_\_

Your Email address \_\_\_\_\_

Your Phone Number \_\_\_\_\_

