

Please return completed form to:

G E M B A

P.O. Box 206, Annapolis Junction, MD 20701

Serving Our Members For



Member Number

Stable Value Account (SVA) CONTRIBUTION FORM

General Information:

Full Name (First, MI, Last)	Social Security No.	Gender <input type="checkbox"/> Male <input type="checkbox"/> Female
Address (Street)	Date of Birth (mm/dd/yyyy)	Home Email Address
(City) (State) (ZIP)	Home Phone No.	Black/Non-Classified Phone No.

STEP 1: Type of Member

<input type="checkbox"/> Active Intelligence Community Employee <input type="checkbox"/> Retired Intelligence Community Employee <input type="checkbox"/> Military Assignee (Assigned to NSA-W) <input type="checkbox"/> Contractor (Assigned to NSA-W) <input type="checkbox"/> Spouse of Employee/Retiree <input type="checkbox"/> Domestic Partner* of Employee/Retiree	Hire Date: _____ Retirement Date: _____ Assignment Date: _____ Contracting Company Name _____ Employee/Retiree Name: _____ Employee/Retiree Name: _____
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*Visit geba.com to print the Declaration of Domestic Partnership form, or call our office for a copy. This application cannot be processed until this form is complete.

STEP 2: Type of Contribution

Make check(s) payable to GEMBA-SRP. Payroll allotment contributions are available for active civilian NSA and DIA employees only.

Traditional IRA ¹	Roth IRA ^{1,2}	Group Annuity (GA)
<input type="checkbox"/> Prior Year Traditional IRA (thru April 15 th) <input type="checkbox"/> Lump sum: \$ _____ In 2010, Up to \$5,000, or \$6,000 if over age 50.	<input type="checkbox"/> Prior Year Roth IRA (thru April 15 th) <input type="checkbox"/> Lump sum: \$ _____ In 2010, Up to \$5,000, or \$6,000 if over age 50.	<input type="checkbox"/> Non-Tax Deductible GA <input type="checkbox"/> Lump sum: \$ _____ <input type="checkbox"/> Bi-weekly Payroll Allotment: \$ _____ (NSA & DIA Only) <input type="checkbox"/> Auto Debit: <input type="checkbox"/> Monthly: \$ _____ <input type="checkbox"/> Bi-weekly: \$ _____ <input type="checkbox"/> First Auto Debit Date: ____/____/____
<input type="checkbox"/> Current Year Traditional IRA Year: _____ In 2011, up to \$5,000, or \$6,000 if over age 50. <input type="checkbox"/> Lump sum: \$ _____ <input type="checkbox"/> Auto Debit: <input type="checkbox"/> Monthly: \$ _____ <input type="checkbox"/> Bi-weekly: \$ _____ <input type="checkbox"/> First Auto Debit Date: ____/____/____ <input type="checkbox"/> Bi-weekly Payroll Allotment (NSA & DIA Only): \$ _____ Beginning pay period: ____/____/____	<input type="checkbox"/> Current Year Roth IRA Year: _____ In 2011, up to \$5,000, or \$6,000 if over age 50. <input type="checkbox"/> Lump sum: \$ _____ <input type="checkbox"/> Auto Debit: <input type="checkbox"/> Monthly: \$ _____ <input type="checkbox"/> Bi-weekly: \$ _____ <input type="checkbox"/> First Auto Debit Date: ____/____/____ <input type="checkbox"/> Bi-weekly Payroll Allotment (NSA & DIA Only): \$ _____ Beginning pay period: ____/____/____	<input type="checkbox"/> 1035 Exchange (GA Only)**: \$ _____ Institution Received from: _____ Exchange Cost Amount: \$ _____
<input type="checkbox"/> IRA Trustee Transfer*: \$ _____ <input type="checkbox"/> IRA Rollover: \$ _____ Institution Received from: _____	<input type="checkbox"/> Roth IRA Trustee Transfer*: \$ _____ <input type="checkbox"/> Roth IRA Rollover: \$ _____ <input type="checkbox"/> Roth IRA Conversion: \$ _____ Institution Received from: _____	

*If a trustee transfer, please include a Trustee Transfer form. This form can be found at www.geba.com.

****If a 1035 exchange, please also include a 1035 Exchange Request Form. This form can be found at www.geba.com.**

STEP 3: Member Signature

Traditional or Roth IRA

- I **currently have** GEBA's most current Summary Plan Description and enclosed the necessary IRA 5305 Forms.
 Please send me GEBA's most current Summary Plan Description and the necessary IRA 5305 Forms.

Group Annuity

- I **currently have** GEBA's most current Summary Plan Description.
 Please send me GEBA's most current Summary Plan Description.

- I understand that the terms and conditions which apply to this Account, including withdrawal penalties, are stated in the GEMBA Summary Plan Description and the GEMBA Custodial 5305 Agreement documents (which are available from GEBA's website). Also, I agree to be bound by the terms listed in the GEMBA Summary Plan Description and the GEMBA Custodial 5305 Agreement as currently in effect or as they may be amended from time to time. I further certify that I have read this new account form and completed all applicable sections completely and accurately. I authorize GEMBA to invest my funds in the manner indicated on this form.

Signature: _____ Date: _____

Please mail this completed form with your contribution to:

GEBA, Inc., P.O. Box 206
Annapolis Junction, MD 20701-0206

Important Information

Beneficiary: We will automatically name the beneficiary on file unless you instruct GEBA differently.

NOTE: All contributions are invested bi-weekly. Please see the current contribution schedule available at the GEBA office or at WWW.GEBA.COM for investment dates.

Payroll Allotments and auto debit deductions will continue until instructions are received (by GEBA) to discontinue. Please refer to the current SRP Automatic Contribution Schedule or the current SRP Contribution Schedule for investment dates.

¹IRA Documents Needed

GEBA requires a signed 5305-A form a new Traditional IRA or 5305-RA for a Roth IRA. The forms can be downloaded from GEBA's website. If the 5305-A or 5305-RA form is not received with the contribution, GEBA will send you one to sign and return.

²2011 Roth IRA Annual Income Limits

If you have taxable compensation and your filing status is:	AND your modified AGI is:	
Married, filing jointly or qualifying widow(er)	Less than \$169,000	You can contribute up to \$5,000 (\$6,000 if you are age 50 or older) as explained under how much can be contributed.
	At least \$169,000 but less than \$179,000	The amount you can contribute is reduced as explained under contribution limit reduced.
	\$179,000 or more	You cannot contribute to a ROTH IRA.
Married filing separately and you lived with your spouse at anytime during the year	Zero (-0-)	You can contribute up to \$5,000 (\$6,000 if you are age 50 or older) as explained under how much can be contributed.
	More than zero (-0-) but less than \$10,000	The amount you can contribute is reduced as explained under contribution limit reduced.
	\$10,000 or more	You cannot contribute to a ROTH IRA.
Single, head of household or married filing separately and you did not live with your spouse at anytime during the year	Less than \$107,000	You can contribute up to \$5,000 (\$6,000 if you are age 50 or older) as explained under how much can be contributed.
	At least \$107,000 but less than \$122,000	The amount you can contribute is reduced as explained under contribution limit reduced.
	\$122,000 or more	You cannot contribute to a ROTH IRA.

FOR GEBA OFFICE USE ONLY:

GEBMA Authorized Signature: _____ Date: _____
Wire Date Invested: ____/____/____ (Date)
1st Autodebit Date: ____/____/____ (Date)
1st Payroll Allotment: ____/____/____ (Date)