

Please return completed form to:

**G E B A**

P.O. Box 206  
Annapolis Junction, MD 20701

Serving Our Members For



Member Number

## Stable Value Account (SVA) NEW ACCOUNT FORM

Please complete this form to open a new SVA investment account. To contribute to an already existing SVA account, please use the GEBA Contribution form available at [www.geba.com](http://www.geba.com).

### General Information:

Applicant's 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	Hire Date: _____
<input type="checkbox"/> Retired Intelligence Community Employee	Retirement Date: _____
<input type="checkbox"/> Military Assignee (Assigned to NSA-W)	Assignment Date: _____
<input type="checkbox"/> Contractor (Assigned to NSA-W)	Contracting Company Name _____
<input type="checkbox"/> Spouse of Employee/Retiree	Employee/Retiree Name: _____
<input type="checkbox"/> Domestic Partner* of Employee/Retiree	Employee/Retiree Name: _____

\*Visit [www.geba.com](http://www.geba.com) to print the Declaration of Domestic Partnership form, or call our office to request a copy. This application cannot be processed until this form is completed and on file.

### STEP 2: Indicate the Intelligence Community or Department of Defense (DoD) organization you are with or were last with (Please check only one):

- Defense Career Management Support Agency (DCMSA)
- Defense Information Systems Agency (DISA)

#### Intelligence Community

- Office of the Director of National Intelligence (ODNI)

#### Program Managers

- Central Intelligence Agency (CIA)
- Defense Intelligence Agency (DIA)
- Federal Bureau of Investigation, Directorate of Intelligence, National Security Branch (FBI)
- National Geospatial-Intelligence Agency (NGA)
- National Reconnaissance Office (NRO)
- National Security Agency (NSA)

#### Departmental

- Drug Enforcement Administration, Intelligence Division (DEA)
- Department of Energy, Office of Intelligence
- Department of Homeland Security, Office of Intelligence and Analysis (DHS)
- Department of State, Bureau of Intelligence and Analysis
- Department of Treasury, Office of Intelligence and Analysis

#### Services

- U.S. Air Force/ Intelligence and Air Intelligence Agency
- U.S. Army/DCS, G2 & Intelligence & Security Command
- U.S. Coast Guard/Intelligence & Criminal Investigations
- U.S. Marine Corps/Intelligence & Marine Corp Intelligence Activity
- U.S. Navy/Office of Naval Intelligence (ONI)

Other: \_\_\_\_\_

At GEBA, there are no membership fees required to be a member. After enrolling into at least one of GEBA's insurance or investment plans, you are considered a GEBA member. Continuing to pay your premium for at least one plan allows you to remain a GEBA member in good standing. Once a GEBA member, always a GEBA member.

### STEP 3: 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 <sup>1</sup>	Roth IRA <sup>1,2</sup>	Group Annuity (GA)
5305-A must be completed and returned to GEBA.		
5305-RA must be completed and returned to GEBA.		
<input type="checkbox"/> <b>Prior Year Traditional IRA</b> (thru April 15 <sup>th</sup> )  <input type="checkbox"/> Lump sum: \$ _____ In 2010, Up to \$5,000, or \$6,000 if over age 50.	<input type="checkbox"/> <b>Prior Year Roth IRA</b> (thru April 15 <sup>th</sup> )  <input type="checkbox"/> Lump sum: \$ _____ In 2010, Up to \$5,000, or \$6,000 if over age 50.	<input type="checkbox"/> <b>Non-Tax Deductible GA</b> <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"/> <b>Current Year Traditional IRA</b> <b>Year:</b> _____  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 and DIA Only): \$ _____ Beginning pay period: ____/____/____	<input type="checkbox"/> <b>Current Year Roth IRA</b> <b>Year:</b> _____  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 and DIA Only): \$ _____ Beginning pay period: ____/____/____	<input type="checkbox"/> <b>1035 Exchange (GA Only)**:</b> \$ _____ Institution Received from: _____  Exchange Cost Amount: \$ _____
<input type="checkbox"/> <b>IRA Trustee Transfer*:</b> \$ _____  <input type="checkbox"/> <b>IRA Rollover:</b> \$ _____ Institution Received from: _____	<input type="checkbox"/> <b>Roth IRA Trustee Transfer*:</b> \$ _____  <input type="checkbox"/> <b>Roth IRA Rollover:</b> \$ _____  <input type="checkbox"/> <b>Roth IRA Conversion:</b> \$ _____ Institution Received from: _____	
PLEASE SEE REVERSE SIDE FOR MORE INFORMATION ON REQUIRED DOCUMENTS AND ROTH IRA ANNUAL INCOME LIMITS		
NOTE: ALL CONTRIBUTIONS ARE INVESTED BI-WEEKLY. PLEASE SEE THE 2010 CONTRIBUTION SCHEDULE AVAILABLE AT THE GEBA OFFICE OR AT <a href="http://WWW.GEBA.COM">WWW.GEBA.COM</a> FOR DUE DATES.  PAYROLL ALLOTMENTS AND AUTO DEBIT DEDUCTIONS WILL CONTINUE UNTIL INSTRUCTIONS ARE RECEIVED (BY GEBA) TO DISCONTINUE. PLEASE REFER TO THE 2010 SRP <u>AUTOMATIC CONTRIBUTION SCHEDULE</u> OR THE 2010 SRP <u>CONTRIBUTION SCHEDULE FOR INVESTMENT DATES</u> .		

\*If a trustee transfer, please also include a Trustee Transfer form.

\*\*If a 1035 exchange, please also include a 1035 Exchange Request Form.

This form can be found at [www.geba.com](http://www.geba.com), under Resource Center, then Forms.

## STEP 4: Beneficiary Designation

### Primary Beneficiary(ies):

1.	Full Name	Date of Birth	Relationship	SSN
Address:				Benefit %:
2.	Full Name	Date of Birth	Relationship	SSN
Address:				Benefit %:

### Contingent Beneficiary(ies):

1.	Full Name	Date of Birth	Relationship	SSN
Address:				Benefit %:
2.	Full Name	Date of Birth	Relationship	SSN
Address:				Benefit %:

- Beneficiaries may be a person(s), estate, trust, or organization. If a trust is named, the legal documentation must be submitted with this form.
- If your primary beneficiary(ies) is(are) unable to accept the distribution, your contingent beneficiary(ies) will receive proceeds of the account.
- Please be sure that percentages listed in each beneficiary category add up to 100%. Use a separate sheet to list any additional beneficiaries. You must sign and date all attachments.

## STEP 5: 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 IRA 5305 Form (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.

### How did you hear about us?

- |  |   |
|--|---|
| <input type="checkbox"/> New Hire/PCS Briefing or Packet | <input type="checkbox"/> Word of Mouth                  |
| <input type="checkbox"/> Website                         | <input type="checkbox"/> Member Services Representative |
| <input type="checkbox"/> Brochure                        | <input type="checkbox"/> Newsletter/Mailing             |
| <input type="checkbox"/> Promotional Table               | <input type="checkbox"/> Email                          |

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Please be sure to sign and date above. Then, submit to GEBA.**

**FOR GEBA OFFICE USE ONLY:**

GEBMA Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Wire Date Invested: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (Date)

1st Autodebit Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (Date)

1st Payroll Allotment: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (Date)

SPD Sent: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (Date)

**Roth IRA**

Form 5305-RA On File (Roth IRA) - \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (Date)

Form 5305-RA (Roth IRA) - **SENT TO MEMBER** \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (Date)

**Traditional IRA**

Form 5305-A On File (Traditional IRA) - \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (Date)

Form 5305-A (Traditional IRA) - **SENT TO MEMBER** \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (Date)

**Notes:**

**1IRA Documents Needed**

GEBA requires a signed 5305-A form for a 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:	
<b>Married, filing jointly or qualifying widow(er)</b>	Less than \$169,000	You can contribute up to \$5,000 (\$6,000 if you are age 50 or older) as explained under <i>how much can be contributed</i> .
	At least \$169,000 but less than \$179,000	The amount you can contribute is reduced as explained under <i>contribution limit reduced</i> .
	\$179,000 or more	You cannot contribute to a ROTH IRA.
<b>Married filing separately and you lived with your spouse at anytime during the year</b>	Zero (-0-)	You can contribute up to \$5,000 (\$6,000 if you are age 50 or older) as explained under <i>how much can be contributed</i> .
	More than zero (-0-) but less than \$10,000	The amount you can contribute is reduced as explained under <i>contribution limit reduced</i> .
	\$10,000 or more	You cannot contribute to a ROTH IRA.
<b>Single, head of household or married filing separately and you did not live with your spouse at anytime during the year</b>	Less than \$107,000	You can contribute up to \$5,000 (\$6,000 if you are age 50 or older) as explained under <i>how much can be contributed</i> .
	At least \$107,000 but less than \$122,000	The amount you can contribute is reduced as explained under <i>contribution limit reduced</i> .
	\$122,000 or more	You cannot contribute to a ROTH IRA.

*Last Updated 1/2011*



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Maryland 20755-6104

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Maryland 20701-0206

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