

FAX TO: 303-801-6021

ATTN: MetHome Plan Service Team

MetLife/FASCore Plans

PLAN CHANGE FORM REQUEST – NON-AMENDMENT

Plan Name: _____ Plan #: _____

Effective Date of Change: _____

☐ Add To Do List on PSC

Include the revised PSC Authorization Form and Signature Authorization Form

If the plan requires Spousal Consent, do they wish to approve via the To Do List? ☐ Yes ☐ No

Note: If the plan approves Spousal Consent via the To Do List, the Plan Sponsor is responsible for verifying that spousal consent has been obtained.

The plan will be set up with all of the following approval options that apply, based on the response above.

• Termination Date

• Vesting

• Spousal Consent

• Final Approval

☐ Add OR ☐ Change logo to participant statement - Camera ready art or TIF file or BMP file included - Black and white – no shading (NOTE: If logo is changing due to Plan or Company name change, Met should ensure Plan Amendment documents have been completed prior to submitting request to FASCore.)

☒ Add OR ☐ Change logo to plan's participant website - gif or jpg file included (NOTE: If logo is changing due to Plan or Company name change, Met should ensure Plan Amendment documents have been completed prior to submitting request to FASCore.)

☐ Add beneficiary recordkeeping option

☐ Use default of spousal consent required if spouse not named 100% beneficiary

☐ Use 50% or Consent - spouse must be at least 50%

Conversion options – check one: ☐ No conversion of existing forms ☐ File to be sent ☐ Paper Forms to be sent

☐ Add Transfer/Allocation Restriction

Termination Date, if applicable: _____ Maximum Transfer/Allocation %: _____

Inv Option/Fund: Fund name: _____ SDIO code: _____

The trans/alloc restriction will apply to all deposit types, and money types for the investment options for each Participant in the plan.

☐ Add Special ER Directed Money Rule – **choose one**

☐ Add transfers out rule – transfers out allowed at any time

☐ Add 100% vested rule – transfers out allowed after participant is 100% vested

☐ Add specific age rule – transfers out allowed after participant is age _____

☐ Add 100% vested/age rule - transfers out allowed after participant is age _____ & 100% vested

☐ Add FASCore QDRO Review & Approval (additional fees apply – FASCore bills MetLife)

☐ Add FASCore Hardship Review & Approval – for Safe Harbor Hardship only (additional fees apply – FASCore bills MetLife)

☐ Add 16b Transfer Restrictions on PSC

PSC ID for the person who will be adding the transfer restriction windows:

PSC User Name _____ PSC ID _____

☐ Other _____

Approved By-

MetLife AE: _____

Date: _____