

Schwab Personal Choice Retirement Account® (PCRA)

Multiple PCRA Election Form

charles SCHWAB

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1-800-231-2855

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1. Introduction

This form is to be used if you wish to allow Participants in the Plan who have a Schwab Personal Choice Retirement Account (PCRA) to open one or more Traditional and/or Roth PCRA.

2. Independent Recordkeeper Information

Independent Recordkeeper Name (please print)
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3. PCRA Elections for Each Plan

Please use this section to list the Plans you wish to include, and your preferences for more than one Traditional and/or Roth PCRA. If you need more space, please attach another sheet and be sure to include the information below.

Plan Name (as it appears on the account)	Plan ID or K4 Master Account
<input type="checkbox"/> Allow One or More Traditional PCRA	Maximum Number of Accounts per Participant
<input type="checkbox"/> Allow One or More Roth PCRA	Maximum Number of Accounts per Participant

Plan Name (as it appears on the account)	Plan ID or K4 Master Account
<input type="checkbox"/> Allow One or More Traditional PCRA	Maximum Number of Accounts per Participant
<input type="checkbox"/> Allow One or More Roth PCRA	Maximum Number of Accounts per Participant

Plan Name (as it appears on the account)	Plan ID or K4 Master Account
<input type="checkbox"/> Allow One or More Traditional PCRA	Maximum Number of Accounts per Participant
<input type="checkbox"/> Allow One or More Roth PCRA	Maximum Number of Accounts per Participant

Plan Name (as it appears on the account)	Plan ID or K4 Master Account
<input type="checkbox"/> Allow One or More Traditional PCRA	Maximum Number of Accounts per Participant
<input type="checkbox"/> Allow One or More Roth PCRA	Maximum Number of Accounts per Participant

Note: If the Plan has set up secondary Plan IDs to accommodate one or more Traditional and/or Roth PCRA in the past, you may wish to de-convert them at this time. If you have more than four secondary IDs to de-convert, please attach another sheet and be sure to include the information below.

In order to initiate the de-conversion, please contact your Schwab Client Service Representative.

De-convert the Secondary Plan ID:	De-convert the Secondary Plan ID:
De-convert the Secondary Plan ID:	De-convert the Secondary Plan ID:



4. Independent Recordkeeper Signature

By signing this form, Authorized Agent of the Independent Recordkeeper acknowledges that:

- Plan Sponsor/Company has authorized the changes to accommodate multiple accounts.
- PCRA Participants in the Plan will have the ability to open multiple Traditional and/or Roth PCRA's.

Signature and Date Required**X**

Independent Recordkeeper Signature (must be an Authorized Agent)

Print Name

Date

Please return the completed form with original signature to:

Charles Schwab & Co., Inc.
Retirement Business Services Operations
P.O. Box 52086
Phoenix, AZ 85072-9209

Please keep a copy for your records.