



How to complete the Hartford Forms

The first three forms below are **REQUIRED** and must be submitted for all new hires

1. Hartford Life Insurance Company Enrollment Record

1. Employee section must be completed with employee's name, social security number, mailing address, phone number, date of birth and dept./location (entity number/parish or school name). Please make sure to complete this form legibly.
2. **Contribution Election:**
 - a. This section is to be filled out only if the employee is electing to contribute his or her own funds.
3. **Investment Election:**
 - a. Section 1 **OR** Section 2 **Must** be completed
 - b. If you elect Section 1 then the percentage should equal 100%

Employee must sign at the bottom of the page on the third line above the barcode.

2. Beneficiary Designation / Spousal Consent Form

This form must be completed.

1. If the employee is married and elects to designate their primary beneficiary as someone other than their spouse, the spouse must read the Spousal Agreement and sign. The employee must also sign where it says participant signature.

2. When listing multiple beneficiaries the percentages must equal 100% under the designation area (primary and contingent beneficiaries)

3. Important Notice to Applicant Regarding Replacement of Life Insurance

This form must be completed. This form is required by the state of Florida. This form offers the employee the choice to receive comparable life insurance information from other providers. This has NO correlation to the Prudential Life Insurance policies offered by the Diocese of Palm Beach.

The employee must check either **yes** or **no** and sign the back of the form.

4. 403(b) Rollover –In or Transfer /Exchange-In Form:

This form only needs to be completed if the employee is rolling over funds from another retirement program outside the Diocese of Palm Beach. This form must be the original. If you have any questions pertaining to Rollovers please contact Michael Steffan at 561-596-8541.

Contact Information

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The Hartford

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