# VMERS VantageCare Retirement Health Savings (RHS) Plan Personal Information Form for Survivors

• Read the instructions before completing the form. Please use blue or black ink.

• Use this form to update your personal information for your RHS account.

• Please check all applicable boxes:

☐ Change in Name (Pid	ease attach legal document)		
1. Essential Information			
RHS Plan Number         RHS Plan Name           8         8         1         7         1         2	State	_	
Account Holder Name (Last, First and Middle	Initial)	Social Security Number	_
2. Account Holder Personal Information			
Mailing Address  Street  City		Evening Phone Number  Area Code  Marital Status	_
State Zip Code		☐ Married ☐ Single	
Daytime Phone Number  Area Code	Date of Birth ///	Gender  — — — Male	
3. Authorized Signature			
For personal information changes:			
I acknowledge that I have read the instructio Survivors. I understand that upon my de sponsor. I acknowledge that I have received	ath, remaining account assets v	will revert to the original RHS participant's pla	an
Participant Signature		Date	

PLEASE RETAIN A COPY FOR YOUR RECORDS AND RETURN THE ORIGINAL TO ICMA-RC Attn: SPT ICMA Retirement Corporation • Vantagepoint Transfer Agents • P.O. Box 17010 • Baltimore, MD 21297-1010 • Toll Free 800-669-7400 • En Español 800-669-8216 • www.icmarc.org

# VMERS VantageCare Retirement Health Savings Plan (RHS) Personal Information Form for Survivors — Instructions

This form is used by a survivor\* of the original RHS participant to supply ICMA-RC with your change in personal information for the VMERS VantageCare Retirement Health Savings (RHS) program.

# \* Survivors include the surviving spouse.

As a survivor of the original RHS participant, you are entitled to utilize the remaining account assets for your own eligible medical expenses. Survivors may not designate a beneficiary under the RHS Plan.

In order for ICMA-RC to process your personal information change efficiently, please complete the form accurately and return it to ICMA-RC. <u>Please be sure to keep a copy for your records of all forms and documentation you submit.</u>

Always review the quarterly RHS statement to confirm the accuracy of your enrollment information. If you discover a discrepancy, contact ICMA-RC Investor Services at 1-800-669-7400 as soon as possible.

Please check each type of change that you are making in your account.

#### 1. Essential Information

Please complete this section carefully. The information you submit will be used to identify the account when you make changes. The RHS plan number (beginning with 88 for spouse) and RHS plan name are available from the most recent quarterly statement.

If you are reporting a name change, please enter your new name into the "Name" line in Part 1, and provide ICMA-RC with documentation of the change, which may include a copy of one of the following: Driver's License, Social Security card, marriage certificate or court order.

### 2. Account Holder Personal Information

The mailing information provided here will determine the address to which your ICMA-RC RHS statement will be sent.

# 3. Authorized Signature

Once you have completed this form, sign it, make a copy for your records, and submit it to ICMA-RC.

Your signature acknowledges that the default investment allocation for the RHS account is the VP Milestone Fund\* of the decedent.

\* Please be advised that with "Fund of Funds" arrangements, additional underlying fees may apply. Please consult the prospectus for details.

Please consult the Vantagepoint Funds Prospectus carefully for a complete summary of all fees, expenses, charges, financial highlights, investment objectives, risks and performance information. Investors should consider the Fund's investment objectives, risks, charges and expenses before investing or sending money. The prospectus contains this and other information about the investment company. Please read the prospectus carefully before investing. Vantagepoint Funds are distributed by ICMA-RC Services LLC, a wholly owned broker-dealer subsidiary of ICMA-RC and member NASD/SIPC. For a current prospectus, contact ICMA-RC Services, LLC by calling 800-669-7400 or by writing to 777 North Capitol Street, NE, Washington, DC 20002-4240, or by visiting www.icmarc.org.