

READY TO ROLL?

Are you or your church ready to roll your benefits to the Church Benefits Board? Here are the steps to get you and your church or organization enrolled into the CBB 403b(9) Plan.

1

Complete Enrollment Interest Form

Visit churchbenefits.org and complete the **Enrollment Interest Form**. This will inform our team what type of benefits you need and if your church is already a participating employer.



2

Enroll your Employer

If your church or organization is not a participating employer, this is the initial step. Our team will work with your church and Financial Administrator to enroll into the plan.



3

Individual Accounts Created

Our team will work with your church or organization to create retirement accounts for all interested staff. You'll be notified when this is complete.



4

Rollover Outside Funds

After your account is created, you can rollover any outside retirement accounts to your new Church Benefits Board account. You'll simply complete the **Rollover Support Ticket** and an Empower Representative will contact you to walk you through this process.



Church Benefits Board

HAVE QUESTIONS?

Contact the CBB team at 770.220.1672 or churchbenefits@churchbenefits.org