### SIMPLE IRA

NEW ACCOUNT APPLICATION

Check here if amendment.

ZIP

### 1

### **Account Registration**

/ togodine megiotiat				
Participant Information  i FOR ASSISTANCE with this form, call Shareholder Services at (800) 662-0201, or the Timothy Plan at (800) 846-7526.	NAME (First, Initial, Last)	GENDER: ○ Male ○ Female	DATE OF BIRTH	
	ADDRESS			
	СІТУ		STATE	ZIP U.S. CITIZENSHIP STATUS:
	DAYTIME PHONE NUMBER	EMAIL (optional)	TAXPAYER ID NUMBER or SSN	O CITIZEN O RESIDENT ALIEN O NONRESIDENT ALIEN
Employer Information				
	COMPANY NAME		EMPLOYER CONTACT NAME (Fit	rst, Initial, Last)

# ADDRESS CITY, STATE

### DAYTIME PHONE NUMBER EMAIL (optional) TAXPAYER ID NUMBER or SSN PLAN EFFECTIVE DATE

#### **Your Beneficiaries**

**WARNING.** If you do not name beneficiaries, your account will be paid out to your estate, and probably be subject to probate.

spousal consent: If you live in a marital or community property state, and your spouse is not the sole primary beneficiary, your spouse must sign the Spousal Consent under Item 6 of this form.

I designate the following (as indicated):

**PRIMARY BENEFICIARY(IES)**, to receive the percentage indicated of my IRA Account in the event of my death.

CONTINGENT BENEFICIARY(IES), to receive the percentage indicated of my IRA Account in the event of the death of my primary beneficiary(ies).

After your death, the SIMPLE IRA assets will be distributed in equal shares (unless indicated otherwise) to the primary beneficiaries who survive you. You may revoke or change the beneficiary designation at any time by completing a new IRA Change of Beneficiary Form and providing it to the Custodian.

**TRUSTS:** To name a trust as your beneficiary, attach to this form either a copy of the pertinent pages of the trust agreement or a certification, in writing, acceptable to the SIMPLE IRA Custodian.

PERCENTAGES: All stated percentages must be whole percentages (e.g., 33%, not 33.3%). If the percentages do not add up to 100%, each beneficiary's share will be based proportionately on the stated percentages.

1.		O PER STIRPES			%
BENEFICIARY NAME	TYPE: O Primary O Contingent		DATE OF BIRTH	RELATIONSHIP	PERCENTAGE
ADDRESS				TAXPA	YER ID NUMBER or SSN
2.		O PER STIRPES			%
BENEFICIARY NAME	TYPE: O Primary O Contingent		DATE OF BIRTH	RELATIONSHIP	PERCENTAGE
ADDRESS				TAXPA	YER ID NUMBER or SSN
3.		O PER STIRPES			%
BENEFICIARY NAME	TYPE: O Primary O Contingent		DATE OF BIRTH	RELATIONSHIP	PERCENTAGE
ADDRESS				TAXPA	YER ID NUMBER or SSN
4.		O PER STIRPES			%
BENEFICIARY NAME	TYPE: O Primary O Contingent		DATE OF BIRTH	RELATIONSHIP	PERCENTAGE

**PER STIRPES:** IF YOU WANT THE CHILDREN OF A BENEFICIARY YOU LISTED TO INHERIT THAT BENEFICIARY'S SHARE (IF THAT BENEFICIARY PREDECEASES YOU), CHECK THE PER STIRPES BOX(ES) ABOVE. THIS WILL OVERRIDE ANY SELECTIONS BELOW.

**IF YOU DID NOT SELECT PER STIRPES,** SELECT THE FOLLOWING THAT ACCURATELY REFLECTS YOUR WISHES FOR THOSE WHO ARE NOT DESIGNATED PER STIRPES. YOU MAY ALSO ATTACH A SEPARATE DESIGNATION DULY SIGNED, DATED AND WITNESSED.

- O The share of a primary beneficiary who predeceases me shall go to the primary beneficiary(ies) who survive me in the ratio that each such surviving primary beneficiary's(ies') percentage bears to the total percentage of all surviving primary beneficiary(ies).
- O The share of a primary beneficiary who predeceases me shall go to the contingent beneficiary(ies) who survive me in the ratio that each such surviving contingent beneficiary's(ies') percentage bears to the total percentage of all surviving contingent beneficiary(ies).



### Contribution Information

Source of Funds	☐ Elective Deferral	Amount: \$	Tax Year: 20		
SPECIAL INSTRUCTIONS:	☐ Employer Match Contribution	Amount: \$			
Recharacterization: An irrevocable	☐ Employer Nonelective Contribution		Tax Year: 20		
recharacterization election must be pro- vided to the IRA Custodian.	☐ Direct Transfer From SIMPLE IRA	· <del></del>	<del></del>		
<b>Direct Transfer:</b> Complete and attach an IRA Transfer form.	Rollover				
Rollover: Complete and attach an IRA	SOURCE:	O SIMPLE IRA	O Employer-Sponsored Plan		
Direct Rollover form.		○ Traditional IRA*	(e.g., 401(a), 401(k), 403(b), governmental 457(b))*		
*SIMPLE IRA: You may not rollover a distribution from a Traditional IRA, SEP		○ SEP IRA*	governmental 457(b)) ·		
IRA or an employer-sponsored plan to a SIMPLE IRA until at least two years have elapsed from the time of your initial	IS THE ROLLOVER BEING COMPLETED WITHIN 60 DAYS OF RECEIPT OF THE DISTRIBUTION?				
participation in your employer's SIMPLE IRA plan.	O <b>YES,</b> Rollover is within 60 days of receipt of the distribution.	O NO, Rollover is <u>NOT</u> within 60 days of receipt of the distribution. (60+ days will only be accepted if accompanied by a Self-Certification of Late Rollover/Conversion form.)	sponsored plan.		
		☐ Self-Certification of Late Roll- over/Conversion form is attached			
	☐ Recharacterization				
	O Qualified Birth or Adoption Distribution(s) O Withdrawal(		) for Terminal Illness		
	○ Qualified Reservist Distribution(s)		onal Expense Distribution(s)		
	○ Qualified Disaster Recovery Distribution(s) ○ Eligible Distribution(s) to Domestic Abuse Victim				
	☐ Other EXPLAIN:				
Group Plan	☐ <b>Yes.</b> This account will be part of a group p	olanEMPLOYER NAME	PLAN NUMBER		
Reduced Sales Charge	LETTER OF INTENT: Please be advised that over the course of the next thirteen months, I intend to purchase amount of the Timothy Plan family of funds equal to or in excess of:				
Class A & C shares combined.	\$50,000 \$100,000 \$	\$250,000	\$750,000		
\$750,000 BREAKPOINT: This selection is only applicable for Fixed Income and High Yield Bond Funds.	If you intend to invest a certain amount over share purchases. If the amount indicated is purchased and any difference in the sales of crowed shares. Please refer to the prospect	s not invested within 13 months, regula charge owed versus the sales charge p	ar sales charge rates will apply to shares		
	RIGHT OF ACCUMULATION: The following accounts, if any, are related and should be included in my aggregate purchases to be calculated when assessing my reduced sales load.				
	1. 2.	3.	4.		
Net Asset Value (NAV)  1 FOR ADVISOR/FUND USE ONLY.	☐ This account is eligible for NAV pur  I certify that ○ this account is eligible for thi	·	·		

# Investment Selection

Your Fund Choices If no share class is indicated, a Class A share			20 INDIVIDUAL	20 INDIVIDUAL		
account will be established.	FUND NAME(S)	CLASS	CONTRIBUTION	CONTRIBUTION	ALLOCATION	1
TO DUDGUAGE CLASS I SUADES. Vo.:	1.	ACI	\$	\$	\$	%
TO PURCHASE CLASS I SHARES: You must be working with a Registered Investment Advisor.	2.	ACI	\$	\$	\$	%
	3.	ACI	\$	\$	\$	%
	4.	ACI	\$	\$	\$	%

Telephone Transaction	If you elect to do so, you may exchange and/or redeem by telephone.			
Privileges	NO, I DO NOT WANT THE FOLLOWING PRIVILEGES:  Telephone Exchange. Telephone Redemption.			
Payment Method				
Payment Method  You can open your account using any of these methods. Please check your choice.  i DIRECT TRANSFERS: Complete and attach the IRA Transfer Request Form.	□ Check (Please make check payable to the Timothy Plan.) □ Bank Wire (For instructions, please contact the Transfer Agent toll free at 1-800-662-0201.) □ Employer (Contributions will be forthcoming from my employer.) □ Direct Transfer (Funds will be transferred directly from another IRA, SEP-IRA or retirement plan.) □ Other			
Acknowledgment				
Your Signature  ↑ WARNING. This application cannot be processed unless signed below by the Traditional (or Inherited) IRA Owner.  CURRENT MARITAL STATUS  ○ I am not married – I understand that if I become married in the future, I must complete a new beneficiary designation that includes the spousal consent provisions.  ○ I am married – I understand that if I designate a primary beneficiary other than my spouse, my spouse must sign below.	By signing this SIMPLE IRA Application, I certify that the information I have provided is true, correct, and complete, and Custodian (Constellation Trust Company, Post Office Box 46707, Cincinnati, OH 45246-0707) may rely on what I have provi In addition, I have read and received copies of the SIMPLE IRA Application, IRS Form 5305-SA, Disclosure Statement an nancial Disclosure, including the applicable fee schedule. I agree to be bound to their terms and conditions. I understand if the deposit establishing the SIMPLE IRA contains rollover dollars, I elect to irrevocably designate this deposit as a roll contribution. I understand that I am responsible for the SIMPLE IRA transactions I conduct, and I will indemnify and hold Custodian harmless from any consequences related to executing my directions. I have been advised to seek competent and tax advice and have not been provided any such advice from the Custodian.	rided. nd Fi- d that lover d the		
NOTE: The Fund Custodian, Constellation Trust Company, charges \$25.00 per account number in connection with plan establishment and maintenance, of which, \$5.00 is remitted to the fund underwriter, Timothy Partners, Ltd.	O I am exempt from the Foreign Account Tax Compliant Act. The IRS does not require your consent to any provision this document other than the certification required to avoid backup withholding.	on of		
USA Patriot Act Notice	IMPORTANT INFORMATION: Under the USA Patriot Act, Federal law requires all financial institutions (including mufunds) to obtain, verify, and record information that identifies each person who opens an account. The information provide is used exclusively as required under the Patriot Act and to provide the services you have requested.			
	WHAT THIS MEANS FOR YOU: When you open an account, we will ask for your name, address, date of birth, and o information that will allow us to identify you. We may also ask for additional identifying documents. The information i quired for all owners, co-owners, or anyone who will be signing or completing a transaction on behalf of a legal entity will own the account. We must return your application if any of this information is missing. If we are unable to verify information, your account may be closed and you will be subject to all applicable costs. If you have any questions regar this application, please call (800) 662-0201.	is re- that y this		
Spousal Consent	CONSENT OF SPOUSE			
SIMPLE IRA owners who reside in or whose IRA is located in a community or marital property state should review this section. This section may have important tax consequences to you and your spouse so please consult with a com-	By signing below, I acknowledge that I am the spouse of the SIMPLE IRA Owner and agree with and consent to my spous designation of a primary beneficiary other than, or in addition to, me. I have been advised to consult a competent advis and I assume all responsibility regarding this consent. The Custodian has not provided me any legal or tax advice.			
petent advisor prior to completing. If this is an Inherited IRA, seek competent legal/tax advice to see if spousal consent is required. If you are	SIGNATURE OF SPOUSE DATE			
not currently married and you marry in the future, you must complete a new beneficiary designation that includes the spousal consent provisions.	THE ABOVE CONSENT WAS SIGNED AND ACKNOWLEDGED BEFORE ME ON THIS			
NOTARY IS REQUIRED.	day of, 20			
	My commission expires:			

CONSTELLATION TRUST COMPANY

The undersigned, as Custodian under the Plan, accepts the above Account and acknowledges receipt and acceptance of the Beneficiary Designation. Accepted by:

DATE

Acceptance by Custodian

CUSTODIAN USE ONLY.



<b>Duplicate Account</b>
Statement

☐ YES, Please send a duplicate account statement to:			
NAME (First, Initial, Last)			
ADDRESS			
сіту	STATE		

### REQUIRED MINIMUM DISTRIBUTION INFORMATION

Rollover of employer plan distribution to IRA by plan participant or former spouse of plan participant. If your contribution is a rollover from an employer plan and you are a plan participant (or the former spouse of the plan participant) of the distributing employer-sponsored plan, required minimum distributions from the plan are not eligible for rollover and must be satisfied prior to the rollover.

Rollover of employer plan distribution to IRA by spouse beneficiary of plan participant. If your contribution is a rollover of a distribution you received from an employer plan you inherited from your spouse, required minimum distributions, including any "hypothetical required minimum distributions" from the plan are not eligible for rollover and must be satisfied prior to the rollover.

Rollover or conversion of IRA distribution by IRA owner. If your contribution is a rollover from an IRA and you are the IRA owner (or the former spouse of the IRA owner) of the distributing IRA must satisfy the required minimum distributions from all my Traditional, SEP and SIMPLE IRAs prior to the rollover/conversion and must be satisfied prior to the rollover/conversion

Rollover of Inherited IRA distribution by spouse beneficiary. If your contribution is a rollover of a distribution you received from an IRA that that you inherited from your spouse, required distributions, including any "hypothetical required minimum distributions" from all the IRAs\* inherited from your spouse are not eligible for rollover and must be satisfied prior to the rollover.

\* If the distributing Inherited IRA is a Roth IRA, required distributions for all Roth IRAs inherited from your spouse must be satisfied prior to the rollover. If the distributing Inherited IRA is a Traditional, SEP or SIMPLE IRA, required distributions for all Traditional, SEP and SIMPLE IRAs inherited from your spouse must be satisfied prior to the rollover.

### For Dealer Use Only

## Your Financial Representative

IF APPLICABLE.

BROKER/DEALER NAME		BRANCH NUMBER
BRANCH ADDRESS		
REPRESENTATIVE'S NAME	PRODUCER NUMBER	PHONE NUMBER

### Mailing Your Application

#### **Return Completed Form**

USE YOUR PREFERRED MAILING METHOD.

REGULAR DELIVERY:

Timothy Plan c/o Ultimus Fund Solutions, LLC PO Box 46707, Cincinnati, OH 45246-0707 OVERNIGHT DELIVERY: