



The Standard®

Savings Form

C.A.T. Retirement and Savings Plan
#810338

Sign up now! Simply complete the information below to begin saving in your retirement plan. *Return the completed form to your Human Resources department.*

YOUR INFORMATION

Social Security Number	Last Name	First Name	
Mailing Address	City	State	ZIP
Date of Birth (mm/dd/yy)	Date of Hire (mm/dd/yy)	Email Address	Phone

HOW MUCH DO YOU WANT TO SAVE?

Pre-Tax Savings (Check One)

The smallest amount you can contribute is 0% of your compensation. The most you can save during 2026 is \$24,500 (\$32,500 if you are age 50 or older, and \$35,750 if you are age 60-63). Other plan or legal limits may apply.

I elect to contribute as pre-tax contributions:

- ☐ _____ % ☐ \$_____ per paycheck ☐ No pre-tax amounts at this time. I elect to opt out of pre-tax contributions and understand I can enroll at a later time.
- ☐ With Step-Up Savings, your contribution rate will be automatically increased by 1% each year on 01/01, until you are contributing a maximum of 15%.

Roth Savings (Check One)

Enter the after-tax amount you wish to contribute to your Roth retirement savings account. The smallest amount you can contribute is 0% of your compensation. The most you can save during 2026 (including any pre-tax contributions) is \$24,500(\$32,500 if you are age 50 or older, and \$35,750 if you are age 60-63). Other plan or legal limits may also apply.

- ☐ _____ % ☐ \$_____ per paycheck ☐ I elect not to make Roth contributions at this time. I understand I can change my election at a later time.
- ☐ With Step-Up Savings, your contribution rate will be automatically increased by 1% each year on 01/01, until you are contributing a maximum of 15%.

AUTHORIZATION

I authorize my employer and the plan administrator to deduct from my earnings the amounts determined by the designation above and to forward such amounts to the plan. I also direct my employer and the plan administrator to implement any other instructions I have provided on this form. I have read the Disclosure Statement on this form and, by signing here, agree to be bound by its terms. The employer, trustees and any others concerned with the administration of the plan are entitled to rely on these instructions; each shall be fully protected in taking or omitting any action under any provisions of the plan in reliance on this information.

Signature _____ Date _____

NEXT STEPS

Please return the completed form to your human resources department. When you submit this completed form, your employer will make your contribution request at the first opportunity allowed under the plan, assuming that you are eligible to participate.

This form will override any changes previously made using The Standard's automated phone system or online via Personal Savings Center.

To make changes to your contribution amount after you have enrolled, please complete a new Savings Form, available from your human resources department.

Visit www.standard.com/retirement to access Personal Savings Center to manage your account or you can call a customer service representative at 800.858.5420.

To select how you want your money to be invested, please use the Investing Form.

DISCLOSURE STATEMENT

You must notify The Standard within 15 days of receipt of your quarterly account statement if an error occurred, or if you requested and confirmed an investment transfer or directive change that was not completed during the period covered by the statement. You may give notice by contacting a customer service representative at **800.858.5420** or by emailing **savings@standard.com**. Unless you give such notice, The Standard will not be liable for any resulting loss to your account. In any case, The Standard will not be liable if circumstances beyond its control prevent the transactions, or if its liability is otherwise limited by regulation or agreement.

The Standard is the marketing name for StanCorp Financial Group, Inc. and its subsidiaries. StanCorp Equities, Inc., member FINRA, wholesales a group annuity contract issued by Standard Insurance Company and a mutual fund trust platform for retirement plans. Third-party administrative services are provided by Standard Retirement Services, Inc. Investment advisory services are provided by StanCorp Investment Advisers, Inc., a registered investment advisor. StanCorp Equities, Inc., Standard Insurance Company, Standard Retirement Services, Inc. and StanCorp Investment Advisers, Inc. are subsidiaries of StanCorp Financial Group, Inc. and all are Oregon corporations.