

2020 HOLIDAY SAVINGS CLUB ACCOUNTS

Application, Change & Distribution Form

Congruity's Holiday Savings Club is an easy way to prepare for the holiday shopping season. Simply set your annual savings goal at the beginning of the year, and the selected amount will be deducted from each paycheck toward that goal. During Thanksgiving week, you will receive the total saved amount.

HOW CAN WE HELP YOU?

I'd like to enroll in the Holiday Savings Club.

I'd like to make a change to my Holiday Savings Club account.

Employee Name _____ **Last 4 Digits of SSN#** _____
First Name Middle Initial Last Name

Preferred E-Mail Address for Holiday Club Communications _____

Client Company Name: _____

Initial Enrollment: I authorize Congruity to deduct the amount indicated in the space below (minimum of \$2.00 per week) from each paycheck beginning with the first payroll following the receipt of this enrollment form. Once funds are distributed each year, the account balance will be set back to \$0, and deductions will resume unless otherwise instructed.

Amount Per Pay Period: \$ _____

Deduction Change: Please change my deduction to the amount indicated in the space below each paycheck beginning with the pay period following receipt of this change form.

Amount Per Pay Period: \$ _____

Stop Deductions: I authorize Congruity to stop my Holiday Savings Club deductions. I understand that distribution will not occur until the distribution date*, and that my deductions will remain halted until I authorize Congruity to resume deductions by completing a new enrollment form.

Please stop Holiday Savings Club deductions

Early Distribution: I authorize Congruity to distribute my current balance as an early distribution. I understand that I may be charged a \$10 service fee, and that funds will be distributed with the first pay period following 10 days after the receipt of this form. **Note:** Holiday Savings Club accounts will be closed permanently upon early distribution. To begin deductions again, employees must complete a new enrollment form.

I am requesting an Early Distribution

Termination Distribution: I authorize Congruity to distribute my current balance as an early distribution due to termination of my employment.

I am requesting a Termination Distribution

Termination Date: _____

***Holiday Savings Club funds will be distributed by no later than the last pay period in November.** There is no cost to participate in the program unless an early distribution is requested. Distributions will be paid the same way payroll is paid (i.e.- direct deposit, check, etc.). **This account will automatically renew until instructed otherwise.**

Note: Employee who have terminated will not automatically receive distribution of Holiday Savings Club accounts. To receive funds early, please complete the "Termination Distribution" section of this form. Otherwise, funds will be disbursed on the normal distribution date, and mailed in the form of a check to the last known address.

Employee Signature

Today's Date
