



**AMERICAN  
UNIVERSITY  
OF BEIRUT**

**AMERICAN UNIVERSITY OF BEIRUT  
RETIREMENT PROGRAM FOR NON-U.S. CITIZEN or RESIDENT ALIEN EMPLOYEES  
PLAN "B"  
NEW ENROLLMENT FORM**

Employee Last Name	First Name	Middle	Citizenship:
Home Address:			
Date of Birth (mm/dd/yyyy)_____ Sex: <input type="checkbox"/> Male or <input type="checkbox"/> Female Marital Status: <input type="checkbox"/> Single or <input type="checkbox"/> Married			Employee ID:

I hereby request that I be included in the Retirement Program Plan "B" for Non-US Citizen or Resident Alien Employees of the American University of Beirut ("Plan B"). I agree to comply with the requirements of Plan B and I authorize the American University of Beirut to deduct \_\_\_\_\_% of my compensation (as defined and limited under the Plan) to be contributed to Plan B, subject to applicable limits.

*Please note that the rate you specify must be in whole-number percentages. A request to change your savings rate, suspend or resume contributions may be made at any time on the Payroll Change Form. Changes will be made as soon as administratively feasible.*

I hereby

- a) acknowledge that my participation in Plan B shall terminate as of the first date that I am covered by a social security, labor law, end of service indemnity, pension plan or similar such programs promulgated or maintained directly or indirectly by the Government of Lebanon.
- b) authorize the University to obtain on my behalf an exemption from making payments into the Lebanese Social Security Fund, if available and applicable.
- c) understand that the benefits payable under this Plan B in the event of my death shall be payable to my beneficiaries as designated pursuant to applicable law.
- d) also declare and confirm that I solely assume any and all results of my investment choice(s) under the plan, hereby waiving my rights to confidentiality, privacy or banking secrecy rules or regulations in respect of the foregoing with respect to AUB or any other individual or entity designated by the Trustee or by AUB to provide services to the Plan.

Please check below if you elect not to enroll in the Plan at this time.

☐ I understand that employer contributions under the Plan will only be made during periods in which I make employee contributions to the Plan, and with full acknowledgement of these facts, I elect not to participate in Plan B at this time.

**FUND ALLOCATION INSTRUCTIONS – please pick from the funds listed OR one of the portfolios.**

**You CANNOT select from both the list of funds and the portfolios; you must select either from the funds or ONE portfolio. This election will apply to both your employee and employer contributions to your Plan account**

**Information on the Funds and Model Portfolios is available on the website: <http://www.globaladminservices.ca/AUB.html>**

**If no valid investment election is made, your employee and employer contribution amounts will be invested in the Moderate Portfolio.**

Investment Funds	Percentage	Model Portfolios	Check one:
Pictet Emerging Markets Index Fund (USD)		Very Conservative Portfolio	<input type="checkbox"/> 100%
Vanguard U.S. 500 Stock Index Fund		Conservative Portfolio	<input type="checkbox"/> 100%
Vanguard Global Stock Index Fund (USD)		Moderate Portfolio	<input type="checkbox"/> 100%
SWC (CH) Index Precious Metal Fund Gold Physical (USD)		Aggressive Portfolio	<input type="checkbox"/> 100%
Credit Suisse (LUX) Commodity Index Plus Fund (USD)			
PIMCO GIS Income Institutional (USD)			
iShares JPMorgan Emerging Markets Local Gov Bond ETF			
iShares Global High Yield Corporate Bond UCITS ETF (USD)			
BlackRock Emerging Markets Government Bond Index Fund			
BlackRock Global Inflation-Linked Bond Fund (USD)			
iShares US Dollar Corporate Bond ETF			
Vanguard US Government Bond Index Fund			
iShares \$ Floating Rate Bond UCITS ETF			
Goldman Sachs US Dollar Liquid Reserves			
SPDR Thomson Reuters Global Convertible Bond UCITS ETF			

Employee Signature: \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_\_

Email: \_\_\_\_\_

SPDR Thomson Reuters Global Convertible Bond UCITS ETF

**AUB OFFICE USE ONLY**

Employment Date (mm/dd/yyyy): _____
Plan Entry Date (mm/dd/yyyy): _____
American University of Beirut Authorized Signature _____ Date (mm/dd/yyyy) _____