PGA OF AMERICA GOLF RETIREMENT PLUS

corebridge financial

PGA of America Golf Retirement Plus

Pre-Enrollment Checklist

Thank you for your interest in Golf Retirement Plus (GRP)! Your financial professionals at Corebridge want to help you get the most out of this opportunity. Your responses to the following brief questions will provide important background information for the GRP Specialist who will be completing the enrollment process with you.

1. Do you own your shop? The GRP Specialists need this information to structure the GRP to meet the needs of the specific facility.

- ◯ Yes
- ◯ No

2. If your answer to question #1 was No, have you discussed with your employer?

- ◯ Yes
- ◯ No

If you have already spoken with your employer, the GRP Specialist can assist you in setting up your GRP based on your discussions. If you have not spoken with your employer yet, the GRP Specialist can provide you with important information to help you and your employer determine the best way to structure your plan.

3. Do you need assistance or additional information before discussing with your employer?

- ◯ Yes
- ◯ No

If you answered Yes, your GRP Specialist will assist you during the enrollment process and provide written information to share with your employer. In addition, the GRP Specialist can speak directly with you and your employer if additional information is needed.

4. Will you be sharing sponsor contributions with additional PGA of America Golf Professionals at the facility?

- ◯ Yes
- ◯ No

During the enrollment call, the GRP Specialist will explain and review the different ways you can share contributions. In addition, the GRP Specialist will assist you with any additional form requirements.

5. Do you work for a management company?

- ◯ Yes
- ◯ No

6. If you answered yes to question #5, which management company?

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Your dedicated Corebridge GRP Specialists are here to help

Your financial professionals are here to help answer any questions you may have. These GRP Specialists are available to meet by phone or Microsoft Teams.

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GRP Specialist Care Center: Call our dedicated PGA toll-free number at 1.833.PGA.PLUS (833.742.7587).

Name ____________________ PGA Number ____________________

State of Residence __________ Phone Number ____________________

pga.corebridgefinancial.com 1.833.PGA.PLUS (833.742.7587)

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