

# Employer-Sponsored Retirement Plan Plan Sponsor Web

✓ **Use this form to:**

- Establish or modify online access to the Plan using T. Rowe Price's Plan Sponsor Web site (PSW) for a sponsor of a T. Rowe Price money purchase pension or profit sharing, Individual 401(k), SEP-IRA, SIMPLE IRA, or 403(b) plan.

- This stamp indicates a signature guarantee is required.
- This paper clip indicates you may need to attach documentation.

PSW is a secure website that enables Plan sponsors to perform certain plan administrative functions, including new participant account setup, participant account maintenance, plan contribution processing, and plan level report downloads. **T. Rowe Price will establish PSW access and will provide an Operator ID and temporary password by mail.**

**Mail to:**  
T. Rowe Price  
P.O. Box 17350  
Baltimore, MD 21297-1350

**Express delivery only:**  
T. Rowe Price Mail Code 17350  
4515 Painters Mill Road  
Owings Mills, MD 21117-4903

## 1 Employer Information

|                                 |                       |          |
|---------------------------------|-----------------------|----------|
| Plan Name                       |                       |          |
| Employer (Plan Sponsor) Name    |                       |          |
| Street or Mailing Address       |                       |          |
| City                            | State                 | ZIP Code |
| Tax Identification Number (TIN) | T. Rowe Price Plan ID |          |
| Plan Contact Name               |                       |          |
| Phone                           | Fax                   |          |
| Email Address                   |                       |          |

## 2 Electronic Funds Transfer (EFT)

This service allows you to move money from the company bank account to the Plan quickly and easily via the Automated Clearing House (ACH) network. EFTs occur when you initiate them. If the bank account is a personal account that is jointly owned by you and another individual (not a company account), a signature guarantee is required for you and all owners of the bank account.

- Enclose a voided check.**  
 Checking Account **or**  Savings Account

**Account provided replaces any account currently on file unless a box is checked below.**

- Primary bank. Default account for all systematic plans and transactions. Existing bank account becomes a secondary bank.
- Secondary bank. Bank account is available on request. Existing bank account remains the primary bank.

|                     |                     |
|---------------------|---------------------|
| Ownership Type      |                     |
| Name on Account     |                     |
| Bank Routing Number | Bank Account Number |

## 3 Default Fund

**Employer must designate a default fund.**

The default fund will be used if a participant fails to select a T. Rowe Price mutual fund for investment of plan contributions. Plan sponsors may wish to consider how the default investment decision may affect their status with respect to certain regulatory requirements.

T. Rowe Price Fund:

## 4 Third-Party Access

**Access to PSW ([troweprice.com/plansponsorweb](http://troweprice.com/plansponsorweb)) WILL NOT be granted to any party other than the Plan contact identified in Section 1 unless the information is completed below.** By completing the information requested below and signing in Section 5, Plan sponsor authorizes and directs T. Rowe Price to provide unique login information to the designated individual as Plan sponsor's agent (Agent) in order to permit Agent separate access to the information and functionality that is available on PSW. In directing T. Rowe Price to provide such third-party access, Plan sponsor specifically acknowledges and agrees that it accepts responsibility for protecting the confidentiality of any Login Information provided to Agent. Further, Plan sponsor acknowledges that T. Rowe Price, in its own discretion, may provide telephone support to Agent, which support may include discussion of information made available on, or functionality of, PSW.

|                           |       |          |
|---------------------------|-------|----------|
| Agent Company             |       | Phone    |
| Agent Name                |       |          |
| Street or Mailing Address |       |          |
| City                      | State | ZIP Code |
| E-mail Address            |       |          |

## 5 Signature(s)

**By signing this form, Plan sponsor acknowledges and agrees that:**

- By selecting the EFT service in Section 2 and signing this form, I hereby authorize T. Rowe Price Services, Inc. (T. Rowe Price), to initiate credit and debit entries to the account at the financial institution indicated and for the financial institution to credit or debit the same to such account through the ACH system, subject to the rules of the financial institution, ACH, and the T. Rowe Price Funds. T. Rowe Price may correct any transaction error with a debit or credit to my financial institution account and/or Fund account.



- T. Rowe Price will provide certain online services via PSW for use by Plan sponsor in its administration of the plan identified in Section 1 (the Plan). Plan sponsor is responsible for procuring and operating all hardware and software to be compatible with the online services.
- Plan sponsor may access PSW by entering the unique operator identifier (Operator ID) and password or by such other means of authentication (collectively, Login Information) as may be made available to it from time to time according to procedures established by T. Rowe Price, and Plan sponsor agrees to accept responsibility for protecting the confidentiality of the Login Information.
- Plan sponsor shall indemnify, hold harmless, and defend T. Rowe Price (including its affiliates and their officers, directors, employees, and agents) from and against any liability, loss, and expenses (including reasonable attorneys' fees and court costs) incurred in connection with: (i) the performance of T. Rowe Price's duties under this agreement, except to the extent that any such liability, loss or expense arises from T. Rowe Price's own negligence or willful misconduct; (ii) any action taken by T. Rowe Price in accordance with the direction or instructions of Plan sponsor or Agent or any failure to act in the absence of such directions or instructions; (iii) any investment action taken or not taken with respect to the default investment fund Plan sponsor has identified in Section 3; (iv) any matter relating to the Plan for which T. Rowe Price has no responsibility, control, or liability under this agreement; and (v) Plan sponsor's breach of its obligations under this agreement.
- Plan sponsor is fully responsible for, and shall indemnify and hold harmless T. Rowe Price and its employees from, any unauthorized use or disclosure of Plan sponsor's or Agent's Plan online information, which use or disclosure results from the unauthorized use of Plan sponsor's or Agent's Login Information. Further, to prevent unauthorized access to the Plan online information, Plan sponsor will notify T. Rowe Price immediately if Plan sponsor's or Agent's Login Information is lost or if either party becomes aware of any unauthorized use of the Login Information or any Plan online information.
- Plan sponsor is responsible for reviewing and verifying the accuracy of all information it (or its Agent) enters directly into PSW and for promptly notifying T. Rowe Price of any resulting errors, omissions, or inaccuracies.
- Plan sponsor (or its Agent) will perform certain plan administrative functions, including new participant account setup (upon receipt of completed new participant account forms), participant account information and status updates, plan contribution processing, and download of reports including the Confirmation of Plan Contribution Report.
- Each payroll contribution instruction Plan sponsor (or its Agent) submits reflects the allocation of plan contributions into one or more T. Rowe Price mutual fund(s) (Funds) in the manner each participant has directed in writing (or as directed by such other manner as may be made available by T. Rowe Price), and Plan sponsor specifically authorizes the investment of contributions into all such Funds.
- Any participant beneficiary information Plan sponsor (or its Agent) enters into PSW is based on a written affirmative beneficiary election made by the Plan participant.
- Plan sponsor will retain in his or her Plan files all participant account forms.
- All computer reporting systems, computer programs, software, recordkeeping systems, passwords, other security codes or Login Information issued to Plan sponsor (or its Agent), and other business practices and procedures of T. Rowe Price made available to Plan sponsor (or its Agent) in connection with this Agreement, other than information that is in the public domain or that is rightfully obtained from third parties, shall be considered "T. Rowe Price Confidential Information." Plan sponsor (and its Agent) shall maintain the confidence of T. Rowe Price Confidential Information with at least the same degree of care that it uses to protect its own confidential information and shall use all reasonable means to prevent the disclosure of any T. Rowe Price Confidential Information to any third party except as required by law. Plan sponsor agrees to notify T. Rowe Price upon discovery of any unauthorized use or disclosure by it (or its Agent) of T. Rowe Price Confidential Information and will cooperate to help regain such T. Rowe Price Confidential Information and prevent its further unauthorized use.

- Neither T. Rowe Price nor Plan sponsor shall be liable for any loss or expense resulting from a failure to fulfill or for delay in fulfilling its responsibilities under this Agreement where such failure or delay arises from any occurrence commonly known as force majeure, including, but not limited to, fire, flood, acts of God, war, riot, acts of any telephone or wireless network, strikes or other acts of workers, accidents, acts of terrorism, revolution, or any other events or circumstances beyond the reasonable control of the party affected by the occurrence.

**This authorization, including any credit or debit entries indicated thereunder, is in full force and in effect until I notify T. Rowe Price of its revocation by telephone or in writing and T. Rowe Price has sufficient time to act on it.**

### 5A Plan Sponsor

The undersigned represents and certifies that he/she is authorized to execute this document on behalf of the plan.


#### Signature and Date Required

|           |                   |
|-----------|-------------------|
| Signature | Date (mm/dd/yyyy) |
|-----------|-------------------|

|   |
|---|
|  X |
|---|

|            |
|------------|
| Print Name |
|------------|

### 5B Bank Account Owner(s)

If the bank account identified in Section 2 is a personal account that is owned by you and other individuals (not a company account), all bank account owners must sign in the presence of a signature guarantor. 

#### Signature(s) and Date(s) Required

|                    |                   |
|--------------------|-------------------|
| Bank Account Owner | Date (mm/dd/yyyy) |
|--------------------|-------------------|

|   |
|---|
|  X |
|---|

|                       |                   |
|-----------------------|-------------------|
| Bank Account Co-owner | Date (mm/dd/yyyy) |
|-----------------------|-------------------|

|   |
|---|
|  X |
|---|

### 5C Signature Guarantee

You can obtain the Medallion signature guarantee from most banks, savings institutions, or broker-dealers. We cannot accept guarantees from notaries public or non-Medallion guarantors. The level of coverage provided by the guarantor's stamp must cover the dollar amount of the transaction or it may be rejected.

#### Medallion Signature Guarantee—Place Medallion Stamp Below

