

HARRISON FLEXIBLE BENEFIT PLAN Semi-Annual Election Form

Step 1. PERSONAL DATA

(Please print clearly)

Social Security Number

Last Name First Name MI

Street Address

City State Zip

Phone Number

Step 2. FUTURE CONTRIBUTIONS

Instructions: Choose how your **future** contributions will be allocated between accounts. I elect to allocate **future** contributions from my employer reports between the following account(s).

Wage Replacement _____ %

Premium Reserve _____ %

TOTAL MUST BE 100%

Step 3. MEDICAL REIMBURSEMENT- FUTURE CONTRIBUTIONS

Instructions: Choose the percentage of future contributions going into Premium Reserve above that you would like automatically moved **MONTHLY** into the Medical Reimbursement Account.

Medical Reimbursement (monthly) _____ %

Step 4. SEMI-ANNUAL ELECTION TRANSFER

NOTE: You must have medical insurance coverage in effect for money to transfer to the **Medical Reimbursement**

Instructions: Choose how your **existing** Premium Reserve balance will be allocated between the three accounts. (If no election is made, money will remain in the Premium Reserve Account.) I elect to allocate my current Premium Reserve balance between the following account(s):

☐ I want this election to happen every six months and to be effective March 1 & September 1 of each year.

Premium Reserve _____ %
(% to leave in Premium)

Medical Reimbursement _____ %
(% to be transferred into Medical)

Dependent Care (Child Care) _____ %
(% to be transferred into Dependent Care)

PERCENTAGES MUST TOTAL 100%

Step 5. SIGNATURE

I understand that all elections will be **EFFECTIVE THE FIRST OF THE MONTH FOLLOWING RECEIPT OF THIS FORM IN THE TRUST OFFICE.**

Signature

Date

Step 6. RETURN BY 08/31/2026*

Return the white copy to:

Harrison Trust

5331 S Macadam Avenue, Suite #258

PMB #116

Portland, OR 97239

Phone: (503) 224-0048 X1681 Fax: (503) 208-9223 Email: pdxflexclaims@benesys.com

***If form is not returned, funds will continue to allocate and transfer based upon the last form on file.**

White: Harrison Flex Copy
Yellow: Member Copy