

STATEMENT OF QUALIFICATION

To Participate in the Servant Solutions Retirement Plan

On _____, the _____ located
(date) (name of Minister, Congregation or Employing Organization)

at _____
(physical address)

☐ Same as above _____ hereby
(mailing address)

(Check-mark one of the statements below)

- ☐ Verifies its affiliation with the Church of God (Anderson, Indiana) and that it is organized and operated for charitable purposes as an organization described in Section 501(c)(3) of the Internal Revenue Code (the "Code"); or
- ☐ Verifies he/she is a self-employed minister as described in section 415(e)(5)(A)(i)(I) of the code; or
- ☐ Verifies that it is a church or qualified church-controlled organization (QCCO), or a non-qualified church-controlled organization (non-QCCO)* that shares common religious bonds and convictions** with the Church of God (Anderson, Indiana), the church sponsor of Servant Solutions, and that it is organized and operated for charitable purposes as an organization described in Code Section 501(c)(3). **PLEASE ATTACH:**
 1. Documentation evidencing shared common religious bonds and convictions with the Church of God (Anderson, Indiana). Qualifying documentation may include Bylaws, Articles of Incorporation, organizational Statement of Faith, the church's Manual, website content, and other documents that point to a direct or indirect relationship with a church or church denomination.
 2. A copy of the IRS exemption letter or proof of exemption under a group ruling. If an official exemption has not been granted, please complete and return the attached declaration.

**A qualified church controlled organization is defined in section 3121(w)(3)(B) of the Code as a church-controlled, tax-exempt organization described in Code section 501(c)(3), other than an organization which: (A) offers goods, services, or facilities for sale, other than on an incidental basis, to the general public, other than goods, services, or facilities which are sold at a nominal charge which is substantially less than the cost of providing such goods, services, or facilities; and (B) normally receives more than 25% of its support from either: (1) governmental sources, or (2) receipts from admissions, sales of merchandise, performance of services, or furnishing of facilities, in activities which are not unrelated trades or businesses, or both. A non-qualified church-controlled organization is a church-controlled, tax exempt organization that meets qualifications (A) and (B).*

***See below for a summary of the religious bonds and convictions of Servant Solutions.*

Said minister, congregation or employing organization, for itself, its successors, and assigns, accepts the provisions of the Servant Solutions Retirement Plan and agrees to abide by them as adopted and amended from time to time by Servant Solutions and ratified by the Ministries Council of *Church of God Ministries*.

To ensure IRS regulatory compliance, please maintain this signed document along with an up-to-date Eligibility and Participation Schedule in your organization's retirement plan files.

IN WITNESS WHEREOF, the above-mentioned minister, congregation or employing organization has authorized its Corporate Secretary, or other executive officer, to sign below on its behalf. (*Self-Employed ministers should sign themselves.*)

By: _____
(Signature)

(Please print name)

(Work email)

(Title of authorized officer)

(Contact phone number)

Note: A signed copy of this approved agreement will be returned to the minister, congregation or employing organization for its files. The eligibility of the minister, congregation or employing organization to participate in the Servant Solutions Retirement Plan is subject to approval by Servant Solutions.

OUR BELIEFS

Servant Solutions

(An Endorsed Agency of the Church of God (Anderson, Indiana))

The Church of God (Anderson, Indiana) is a global movement of people seeking to fulfill God's mission in the world. We're committed to studying the Word of God and faithfully living it out.

The following statements reflect the heart of the Church of God:

- **Salvation makes us members of God's Church.** We believe that the Church is composed of every person who has accepted Jesus Christ as Savior. We enter into the life of the Church, not by joining a denomination or a human organization, but by committing our lives to Christ (John 3:1-7).
- **Christians are called to be one.** We believe that God calls all followers of Christ to live in unity and peace, regardless of who they are or the church they attend (Galatians 3:28). While we may not agree on everything, we can rally around our subject, Jesus.
- **We must be holy.** We believe that followers of Christ have been called to live a life of love, purity, and godliness. We are called to live like Christ, taking on a new nature (2 Corinthians 5:17).
- **The Lordship of Jesus.** There is one Lord, who is God's Son Jesus Christ, over the Church. Christ is the Church's ultimate authority on all matters (Acts 2:36).
- **Making Disciples.** Each of us is called to fulfill Matthew 28:18-20, making fully devoted followers of Christ – disciples – who will then teach others to follow Christ.
- **Loving God and Neighbor.** We are called to fulfill Matthew 22:37-39, not only loving God with our entire being but also loving all that He loves.
- **The Work of the Holy Spirit.** God's Spirit equips believers with unique gifts that enable us to carry out the mission of Christ in the world. At the same time, the Spirit produces love, joy, peace, patience, kindness, goodness, faithfulness, gentleness, and self-control in every believer (Galatians 5:22-23), which demonstrate the Spirit's presence within us.
- **Stewardship.** Since God is the source of life, all of life is to be used for the honor, glory, and service of God (Psalm 24.1).

You will find a great diversity of convictions and practices with the Church of God. Though we have differences, we share a common story of faith, growing together into the fullness of Christ (Ephesians 4:13). We worship and serve as citizens of God's kingdom. We celebrate our life in Christ and accept our call to be the body of Christ in our world – all to the glory of God.

Office Use:

Documentation review:

- ☐ Document approved
- ☐ Applying minister, church or organization is listed in the yearbook of the Church of God (Anderson, Indiana) (IRS Group Exemption Number 1489).
- ☐ Applying minister, church or organization has provided sufficient documentation verifying that it shares common religious bonds and convictions the Church of God (Anderson, Indiana), the church sponsor of Servant Solutions, and that the church or organization is organized and operated for charitable purposes as an organization described in Code Section 501(c)(3).

Reviewed by: _____ Dated: _____
Servant Solutions

DECLARATION OF TAX-EXEMPT STATUS

(Check-mark one of the statements below)

- ☐ Organization **does** have a 501(c)(3) designation on file with the IRS. (Please attach a copy of the IRS exemption letter to page 1 of this document)
- ☐ Organization **does not** have a 501(c)(3) designation on file with the IRS. (Please complete section below)

The term church is found, but not specifically defined, in the Internal Revenue Code. In its most generic sense, a church is defined as “a place of worship.” Churches that meet the requirements of code Section 501(c)(3) are automatically considered tax-exempt and are not required to apply for and obtain recognition of tax-exempt status from the IRS. Although there is no requirement to do so, many churches seek recognition of tax-exempt status from the IRS because this recognition assures church leaders, members, and contributors that the church is recognized as exempt and qualifies for related tax benefits.

If a church decides not to apply for and obtain tax-exempt status from the IRS, it must meet the following requirements:

- the organization must be organized and operated exclusively for religious, educational, scientific or other charitable purposes;
- net earnings may not inure to the benefit of any private individual or shareholder;
- no substantial part of its activity may be attempting to influence legislation;
- the organization may not intervene in political campaigns, and
- the organization’s purposes and activities may not be illegal or violate fundamental public policy.

Group Ruling designation:

A church with a parent organization may be tax-exempt via a *group ruling*. If the parent holds a group ruling, then the IRS may already recognize the church as tax-exempt. Under the group exemption process, the parent organization becomes the holder of a group ruling and, it identifies its affiliated churches via a list provided by the parent organization to the IRS. If the church is included on the parent’s list, it doesn’t need to take further action to obtain recognition of tax-exempt status. (Please include a copy of your group ruling, if applicable.)

By signature of the Corporate Secretary or other executive officer of

(name, city & state of church)

I affirm that our church has not obtained a 501(c)(3) tax-exempt designation, but it does meet the requirements listed above to qualify for tax-exempt status.

(Signature)

(Date)

(Printed name)

(Title of authorized officer)

SERVANT SOLUTIONS

13300 Olio Road, Suite 110 • Fishers, IN 46037

Phone 800-844-8983 • Fax 765-642-3942

Contribution Remittance Contact Information

To help us serve your organization well, please provide the contact information for the person responsible for submitting retirement contributions and related payment details. This helps Servant Solutions know who to contact with questions about contribution remittance, payroll timing, ACH/payment setup, missing information, or future process updates.

Primary Remittance Contact

Name _____

Phone Number () _____ Email Address _____

Bookkeeper/Payroll Contact *(If different from above)*

Name _____

Phone Number () _____ Email Address _____

Contribution Process

How often are contributions submitted?

☐ Weekly ☐ Biweekly ☐ Semimonthly ☐ Monthly ☐ Quarterly ☐ Annually

Is payroll handled ☐ internally or by a ☐ third-party provider?

If third-party, provider name and contact:

Provider Name: _____

Provider Contact Info:

Phone Number () _____ Email Address _____

Under the Servant Solutions Plan Document, employers should remit employee contributions promptly. Monthly contributions are considered timely when received within 15 business days following the end of the month in which the contributions were withheld from employee pay.

Acknowledgment

I understand that Servant Solutions may contact the individuals listed above regarding contribution remittance, payment questions, setup needs, and process updates.

Signature _____ Date _____

Printed Name _____

Title _____ Date _____