



ACH Direct Deposit Authorization Agreement

- For your security, and to assure an accurate transfer of funds, complete this entire form in a legible manner and attach a voided check where indicated below.
- The routing and account numbers on this form must be identical to the routing and account numbers on your voided check.
- The payer name on the voided check must match the plan participant’s name.
- If a voided check is not available, or if the account number or routing number provided on this form is different than on the voided check, include a letter from the bank or financial institution on their letterhead. Have the letter signed by an authorized representative of the bank and indicate the name of the account holder and provide the routing and account numbers to be used by Pelion Benefits, Inc. for ACH purposes.

I hereby authorize Pelion Benefits, Inc. to initiate credit entries or such adjusting entries, either debit or credit which are necessary for corrections, to my checking or savings account indicated below and the financial institution named below to credit (or debit) the same to such account.

Financial Institution _____ Checking__ Savings__

Address: _____

City: _____ State: _____ Zip: _____

Routing Number:

--	--	--	--	--	--	--	--	--	--

 Account Number: _____

This authority is to remain in full force and effect until Pelion Benefits, Inc. has received written notification of its termination in such time and in such manner as to afford Pelion Benefits, Inc. a reasonable opportunity to act on it.

Print Name: _____ Social Security Number: XXX-XX-_____

Address: _____

City: _____ State: _____ Zip: _____

Employer: _____ Phone: _____ E-mail _____

Signature: _____ Date: _____

ATTACH A VOIDED CHECK HERE



Instructions For Uploading Forms To Our Website

1. Scan your documents and save. Usually, you can scan multiple pages in the same file. If you do not have a scanner, take a photo of your document with your phone. Turn the flash on, hold the phone directly above the document, center the document in the frame, then take the picture. Check the picture to make sure it is in focus. Plug your phone into your computer and save the picture.
2. Open your internet browser.
3. Go to www.pelionbenefits.com
4. Select Upload Forms. It is the second tab at the top of the home page. Click [“Please use this link to securely upload your files.”](#)
5. Enter your email, first name, last name and your employer.
6. Click the blue Continue button.
7. Click the “Browse files” text in the middle of the screen.
8. Locate your saved files that you want to upload. Click on the file, then click “Open.” If you need to upload another document, click “+Add more” and repeat step 7.
9. Once you have all the files you wish to upload, click the blue Upload button in the bottom left corner.
10. Wait for the progress bar to reach 100% for each item. Once each item has “Uploaded” written and highlighted in green, you are finished.
11. Click the x to close your session.
12. You will receive an email verification indicating your file has been uploaded successfully.