

# SUU RETIREMENT CHANGE FORM

Employee Name \_\_\_\_\_ T Number \_\_\_\_\_

Change Request Date \_\_\_\_\_ *May take up to 2 pay periods for change to be effective on payroll*

## Distribution of University Contribution 14.2% - 401(a)

Fidelity \_\_\_\_\_% TIAA \_\_\_\_\_%

*(must equal 100% ex; 60/40, 70/30, 90/10 etc.)*

Initial investments will be into a "target date" fund. Employees should log on to their investment provider and personally review and allocate funds. Employees will have access to 401(a) funds 32 days after they end employment with SUU.

## VOLUNTARY CONTRIBUTION AND SALARY REDUCTION AGREEMENT

<u>Fidelity</u>	<u>\$ Amount</u>	<u>OR</u>	<u>Percentage</u>
403b	\$ _____		_____ %
403b ROTH	\$ _____		_____ %
457	\$ _____		_____ %

<u>TIAA</u>	<u>\$ Amount</u>	<u>OR</u>	<u>Percentage</u>
403b	\$ _____		_____ %
403b ROTH	\$ _____		_____ %
457	\$ _____		_____ %

403(b) contributions are pre-tax, 403(b)ROTH and 457 are post-tax.

403(b), 403(b)ROTH and 457 amounts have a combined contribution limit set by the IRS. Each year the limit may change, or employees may be eligible for "catch up" contribution limits. SUU and/or Human Resources cannot give retirement advice or calculate the amount the employee is eligible to contribute. If the employee needs advice, they can contact their investment provider.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
HR Signature

\_\_\_\_\_  
Date