

SALARY REDUCTION AGREEMENT
FORDHAM UNIVERSITY RETIREMENT PLAN
VOLUNTARY CONTRIBUTIONS

Change in Contribution Amount New Election Change in Investment Provider (Online Provider Enrollment Required*)

Name: _____ Date of Birth: ___/___/___ FID# A _____
Position Title: _____ Date of Hire: ___/___/___
Email: _____ Contact Phone: (_____) _____

1) I authorize the following Voluntary Contribution to be deducted PRE-TAX from my salary on a PER PAY PERIOD BASIS:

_____ % (Percentage only)

You may not elect more than 85% in order to comply with your statutory and required deductions.

STOP AFTER-TAX Contributions

The amount is to be contributed to my account (check only one):

TIAA (TP1)

Fidelity Investments (TP2)

ROTH - FACULTY/ ADMINISTRATORS/ LOCAL 810 EMPLOYEES ONLY

2) I authorize the following ROTH Voluntary Contribution to be deducted AFTER-TAX from my salary on a PER PAY PERIOD BASIS:

_____ % (Percentage Only)

STOP AFTER-TAX Contributions

The amount is to be contributed to my account (check only one):

TIAA (IP1)

Fidelity Investments (IP2)

IRS Annual Max limits for your voluntary contributions include regular pre-tax & after-tax ROTH deductions.

3) Employees age 50 & over are eligible to contribute up to an additional \$6,500 to their annual maximum. Your percentage election above will include your catch-up election.

I authorize an additional voluntary contribution of \$6,500 as a catch-up contribution.

Your deductions will start with the next available payroll date after receipt of this form and completion of online enrollment with new elected provider.

**Check this box if this is a new election and you have enrolled online with a provider(s):*

X

SIGNATURE (REQUIRED)

DATE (REQUIRED)

OFFICE USE ONLY

Begin on payroll ending: _____

1. PRE-TAX VOLUNTARY CONTRIBUTION _____ %

FACULTY ADMIN

STOP PRE-TAX OFFICE CODE: TP _____

LOCAL 810 LOCAL 153

2. AFTER-TAX VOLUNTARY CONTRIBUTION _____ %

HR Initials _____ Date: _____

STOP POST-TAX / OFFICE CODE: IP _____

HRIS Initials _____ Date: _____

SERVICE DATE: _____/_____/_____