



Salary Reduction Agreement – TDI 403(b)

Use this form to enroll in the TDI or to change/discontinue your current TDI election.

A. Employee Information

Name (Last, First, Initial)

Social Security Number (required)

Day Phone / Email

Date of Birth

B. Select ONE Provider: and then → C. Enter your contribution percentage(s):

	<i>Pre-tax</i>	+	<i>Roth (after-tax)</i>	=	<i>Total</i>
<i>TDI:ous</i> (through Fidelity Investments)	%	+	%	=	%
<i>TDI:tiaa-cref</i>	%	+	%	=	%
<i>TDI:valic</i> (closed to new participants)	%	+	N/A	=	%

* Total must be a whole percentage between 1 and 85, and Roth contributions cannot exceed 60%. *
**TO STOP CONTRIBUTIONS: Enter "0" percent in Section C (above). **

D. Acknowledgement, authorization and signature:

INITIAL INVESTMENTS (for new participants): If you do not select specific investments with your provider they will be allocated to a default investment depending on the TDI Provider that you select. For TDI:ous (through Fidelity Investments) the default investment is one of the Fidelity Freedom Funds; a lifecycle investment that most closely corresponds to your projected retirement date. For TDI:tiaa-cref the default investment is the CREF Money Market Account. You can find additional information about these investments, select specific investments for future contributions or change your current account allocations at any time by contacting your selected TDI Provider (contact information listed on the back of this form).

EFFECTIVE DATE OF ELECTIONS: Forms received at your institution's HR department by the 10th of the month will be effective during the current month. Forms received after the 10th will become effective starting in the next pay month.

INFORMATION TRANSFER AUTHORIZATION: Your signature below serves as authorization for the Oregon University System to provide your TDI Provider (as selected in Section B) with your personal information necessary for the establishment of a TDI 403(b) account.

DEFERRAL AUTHORIZATION: I authorize the actions requested above by signing and dating this form. I acknowledge these elections supersede all prior elections. The maximum calendar year salary deferral amount is determined by the IRS via the General Limit (IRC 402(g) - \$17,500 in 2014) and additionally, if applicable, the Age 50 Catch-Up Limit (IRC 414(v) - \$5,500 in 2014). Your annual maximum will change to stay synchronized with any future adjustments to the IRS limit, but your contributions will not exceed the percentage requested through this form.

ACKNOWLEDGEMENT OF RESPONSIBILITIES: The instructions and information on this form as well as the information in the TDI Retirement Plan Decision-Making Guide are an integral part of this agreement and provide essential information for understanding the OUS Tax Deferred Investment 403(b) Plan. I will ensure that contributions are limited so as to not cause a maximum limits violation if other outside 403(b) plans are aggregated.

Employee Signature

Date

Institution

Human Resources Use Only Date Received: _____ Entered by: _____ Entered Date: _____

