



# Retirement Plan Change Form

This form is for active employees to provide instructions for retirement plan deductions and contributions.

EID #:

Effective Date:

## 403(b) (Your contributions toward your retirement plan taken through payroll deduction)

Pre-Tax 403(b) Amount:

Record-keeper selection: (You can choose one or the other or both)

Fidelity:

TIAA:

Post-Tax Roth 403(b) Amount:

Record-keeper selection: (You can choose one or the other or both)

Fidelity:

TIAA:

If you were hired before January 1, 1989, you may have additional options. Contact the benefits department for more details.

## Max My Contributions:

Max my contributions will ensure that as the IRS increases maximum contributions, your contributions will automatically increase. If you request maximize my contributions as a new employee, enter the amount you have contributed toward any other qualified plan this year - . If you are 50 or over, this will include the catch up as allowed by law. [See annual maximums](#) . If you have been at Rice for more than 15 years, you may be eligible for other, additional, catch-up contributions. Contact [Benefits@rice.edu](mailto:Benefits@rice.edu) for more information.

## Opt Out:

**I do not wish to participate in the 403(b) plan**

If you opt out of the plan now, you can opt in at any time in the future by completing this form again.

## 401(a) (Rice's automatic contribution to your retirement for benefit eligible employees)

Record-keeper selection: (You can choose one or the other or both)

Fidelity:

TIAA:

## Agreement:

[click here for the Retirement Plan Document](#)

Signature:

Email: