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## Participant Enrollment / Investment Election Form

### ESSDACK Consortium 403(b) Plan

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#### **PARTICIPANT INFORMATION** (Please Print Information Clearly)

Employee Name: \_\_\_\_\_ Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Street: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Date of Hire: \_\_\_\_\_ Married: \_\_\_ Single: \_\_\_

Email Address: \_\_\_\_\_ School District: \_\_\_\_\_

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#### **CONTRIBUTION ELECTION**

##### **Elective Deferrals**

I elect to participate and contribute \_\_\_\_\_% or \$\_\_\_\_\_ of compensation per pay period on a *pre-tax basis*. (Maximum for all 403(b) accounts – pre-tax and Roth 403(b) contributions: \$16,500)

I elect to participate and contribute \_\_\_\_\_% or \$\_\_\_\_\_ of compensation per pay period to a *Roth 403(b)*. (Maximum for all 403(b) accounts – pre-tax and Roth 403(b) contributions: \$16,500)

I elect not to make *elective deferrals* until further notice. I understand that if I do not participate now, or discontinue participation, I must wait until the next available enrollment date.

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#### **SIGNATURES**

\_\_\_\_\_  
Participant's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Plan Administrator's Signature

\_\_\_\_\_  
Date

##### **Catch-up Contributions**

NOTE: If you will be 50 years old or older as of the last day of the calendar year and otherwise contribute the maximum allowable amount to the Plan, you are entitled to make additional "catch up" contributions of up to \$5,500 for 2010. You may also qualify for an additional increased elective deferral limit if you have at least 15 years of service with a qualifying employer. See the Plan Administrator for more details on how to make these catch up contributions