

Roth 403(b) Salary Reduction Agreement (SRA)

A. Employee Information:

Name (Last, First)	UFID#
Email	Daytime Phone Number

B. Choose a contribution action (check one):

Start
 Change
 Stop

C. Select one (1) Roth 403(b) vendor and indicate the bi-weekly contribution amount:

Check One	Vendor	After-tax Contribution (specify \$ or %)
	Fidelity	
	ING	
	MetLife	
	VALIC	

D. Effective Date:

This SRA is effective in the current pay cycle when the form is received by Human Resource Services.

E. Acknowledgement, authorization and signature:

Contract: Prior to completing this agreement, I have submitted the required account contract for the vendor selected. I understand that failure to complete the vendor contract will result in my contributions being returned.

Changes: Roth 403(b) participants may make changes at any time throughout the year by completing a new SRA.

State University System Optional Retirement Program (SUSORP) Participants: May contribute to a Roth 403(b) without first contributing the maximum amount to the SUSORP.

IRS Contribution Limits: The 402(g) annual limit includes elective deferrals to 403(b) plans including Roth, Tax-Deferred and the SUSORP, 401(k) plans and the federal government’s Thrift Savings Plan including contributions to other employer plans.

Deferral Authorization: This SRA must be signed in order to be processed. By signing this SRA, I understand that this agreement is legally binding and irrevocable with respect to amounts earned while it is in effect. I am responsible for the accuracy of the excludable amounts stated in this Agreement; for monitoring the accuracy of the dollar amount to be deferred on an annual basis; for any overstatement of the amounts excludable as a salary reduction in this agreement, or any other violation of the requirement of Sections 403(b), 402(g) and/or 415, IRC; and for any additional taxes, interest, and penalties that may be assessed.

Employee Signature	Date
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Submit completed form to the HRS Retirement office via fax, (352) 392-5166, or email, retirement@ufl.edu.

For HRS Retirement Office Use Only	Date Received	Entered By	Date Entered