UF 403(b) Salary Reduction Agreement (SRA)

Employee Information

Name (Last, First) ___________________________ UF ID # ___________________________

Email Address ___________________________ Daytime Phone Number ___________________________

Contribution Action, Plan Type, Vendor, and Amount

A. Type of 403(b) Plan (choose one):
   [ ] Tax-Deferred
   [ ] After-Tax ROTH

B. Indicate the ONE-TIME contribution dollar amount under your selected vendor.

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<th>Fidelity</th>
<th>MetLife</th>
<th>TIAA</th>
<th>VALIC</th>
<th>VOYA</th>
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Acknowledgement and Authorization

- Effective Date: I understand this SRA is effective ONLY FOR THE 12/21/2018 PAYCHECK and that my biweekly contributions will be restored to the previous percentage/amount for subsequent paychecks.
- I understand this form must be received by UF Benefits no later than close of business on 12/3/2018.
- IRS Contribution Limits: My voluntary contributions to 403(b) plans (including SUSORP, Tax-Deferred UF 403(b), and Roth UF 403(b) plans), 401(k) plans, the federal government’s Thrift Savings Plan, and other employer plans are in compliance with the IRS 402(g) annual limit.
- Deferral Authorization: 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
  - Monitoring the accuracy of the dollar amount to be deferred on an annual basis
  - Any overstatement of the amounts excludable as a salary reduction in this agreement or any other violation of the requirement of IRC Sections 403(b), 402(g), and/or 415
  - Any additional taxes, interest, and penalties that may be assessed

Employee Signature ___________________________ Date ___________________________

(This SRA must be signed in order to be processed.)

SUBMIT COMPLETED SRA TO THE UF BENEFITS OFFICE VIA FAX (352-392-5166) OR EMAIL (benefits@ufl.edu)

For Vendor Representative Use Only

For UF Benefits Use Only

Date Received

Date Entered

Entered By