

# CONTRIBUTION CHANGE

**INSTRUCTIONS:** Complete this form when you wish to modify or stop your contributions or make a one-time contribution. Return the completed form to your in-house Benefits Administrator. Pension Dynamics will set up your account within two (2) business days after receiving the completed forms from your employer. Once your account is setup you may access a copy of the Summary Plan Description (SPD) by logging into your account at [www.pensiondynamics.com](http://www.pensiondynamics.com). Refer to your Employee Information Booklet for account access.

Plan Name: \_\_\_\_\_

Example "ABC Company 401(k) Retirement Plan" If you are unsure about your Plan Name, please contact your human resources or benefits department.

## SECTION 1. EMPLOYEE INFORMATION

\_\_\_\_\_  
Name Social Security Number

\_\_\_\_\_  
Daytime Phone Number Evening Phone Number Personal E-mail Address

## SECTION 2. COMPLETE IF YOU WISH TO CHANGE OR STOP YOUR FUTURE CONTRIBUTIONS

**Maximum Deferral:** You can defer the lesser of 100%, subject to required income withholding, of your gross compensation per plan year or the maximum dollar amount allowed by the IRS per calendar year. The dollar limit is indexed annually by cost of living adjustments. This limit applies to all elective deferrals by an employee under all cash or deferred arrangements in which the employee participates, including two or more arrangements of two or more unrelated employers.

Stop My Contributions

Effective \_\_\_\_\_ (first day of the next pay period) I request that my contribution election be revoked.

Refer to the SPD for your next available re-entry date.

Change My Contribution Amount

Effective \_\_\_\_\_ (Refer to the SPD) I request that my per pay period contribution election be amended:

I hereby authorize payroll deductions PER PAY PERIOD in the following: (Please check your SPD if your plan allows Roth. If you elect Roth and your plan does not allow Roth, your contributions will be deducted as pre-tax.)

Pre-tax \_\_\_\_\_ % of **SALARY** or \$ \_\_\_\_\_ After-Tax Roth (if allowed) \_\_\_\_\_ % of **SALARY** or \$ \_\_\_\_\_

## SECTION 3. COMPLETE IF YOU WISH TO MAKE A ONE-TIME CONTRIBUTION

One-Time Contribution

Effective \_\_\_\_\_

I hereby authorize a One-Time payroll deduction in the following: (Please check your SPD if your plan allows Roth. If you elect Roth and your plan does not allow Roth, your contributions will be deducted as pre-tax.)

Pre-tax \_\_\_\_\_ % of **BONUS** or \$ \_\_\_\_\_ After-Tax Roth (if allowed) \_\_\_\_\_ % of **BONUS** or \$ \_\_\_\_\_

## SECTION 4. EMPLOYEE AUTHORIZATION

I understand that these changes will be executed upon receipt of this form.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date