

403(B) SALARY DEFERRAL AGREEMENT

Retirement Plan Contribution Election Template

1. Employee Information

EMPLOYEE NAME _____

EMPLOYEE ID / SSN (LAST 4 DIGITS) _____

EMAIL ADDRESS _____

PHONE NUMBER _____

2. Agreement Type

- New Enrollment:** Initiate new salary deferral contributions.
- Change Contribution:** Modify existing salary deferral amounts.
- Stop Contribution:** Suspend all future salary deferral contributions.

3. Contribution Election & Allocation

Specify the amount to be withheld from your salary each pay period and contributed to your 403(b) account. Select either a dollar amount or a percentage of compensation.

Contribution Type	Percentage (%) Per Pay Period	OR	Dollar Amount (\$) Per Pay Period
Pre-Tax 403(b) Contribution	_____ %		\$ _____
Roth 403(b) Contribution (Post-Tax)	_____ %		\$ _____
Total Contribution	_____ %		\$ _____

EFFECTIVE DATE (MUST BE A FUTURE PAYROLL CYCLE) _____

4. Employee Signature & Acknowledgement

By signing this Agreement, I authorize my employer to reduce my salary each pay period by the amount elected above and to transmit this amount to the designated 403(b) investment provider. This Agreement is legally binding and irrevocable with respect to amounts paid while it is in effect. It will remain in effect until I submit a new Salary Deferral Agreement or terminate employment.

EMPLOYEE SIGNATURE _____

DATE _____

5. Employer Acceptance (For Payroll Office Use Only)

AUTHORIZED REPRESENTATIVE NAME _____

PAYROLL EFFECTIVE DATE _____

EMPLOYER SIGNATURE

DATE