

457(b)Deferred Compensation

Catch-Up Election Form

Personal Information

Name:	SSN or Account Number:
Date of Birth:	Gender: ☐ Male ☐ Female
Address:	City, State, & ZIP:
Home Phone Number:	Work Phone Number:
Employer Name:	Email Address:

Retirement Age: Earliest: _____ (Age at which you are eligible to retire with full retirement benefits)

Latest: _____

Enter number of full years of service completed: _____

Enter the month that next full year of service is completed: _____

I hereby elect the following Normal Retirement Age (NRA): _____

It is within the **EARLIEST** and **LATEST** ages specified above and will occur in the calendar year: _____

Determination of Underutilized Deferrals for Past Years

List Past Calendar Years (after 1978)	Employer(s)	Gross Earnings	(A) Maximum Eligible Deferral[2]	(B) Actual Deferral [3]	(C) Underutilized Deferral (A-B)
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
TOTAL UNDERUTILIZED DEFERRAL					\$

Scheduled Deferrals

For the last 3 calendar years ending prior to the year in which NRA occurs as specified in the Participant Information above

List Past Calendar Years (after 1978)	(D) Estimated Gross Earnings	(E) Maximum Eligible Deferral (Without Catch-Up) [2]	(F) Scheduled Catch-Up Amount [4]	Total Deferral Catch-Up (E+F) (Maximum 2x otherwise applicable dollar limit/year) [3]
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
TOTAL UNDERUTILIZED DEFERRAL				\$

- [1] List only those years in which both of the following occurred: 1) your employer had a Section 457 Plan and 2) you were eligible to participate.
- [2] 33 1/3% of includible compensation after reductions for contributions to certain pre-tax plans, to a maximum of \$7,500 through 1997, \$8,000 for 1998 through 2000, and \$8,500 in 2001. 100% of includible compensation after reductions for contributions to certain pre-tax plans, to a maximum of \$11,000 in 2002, \$12,000 in 2003, \$13,000 in 2004, \$14,000 in 2005, \$15,000 in 2006, \$15,500 for 2007 and 2008, \$16,500 for 2009, 2010, and 2011, \$17,000 for 2012, \$17,500 for 2013 and 2014, and \$18,000 for 2015. This catch-up request is for 457(b) plan only.
- [3] For years prior to 2002, include deferrals under all eligible 457 plans, 403(b) plans, 401(k) plans, and Federal Thrift Plans with this or other employers. For 2002 and thereafter, include only deferrals under 457 plans.
- [4] No Catch-Up amounts are permitted during the calendar year in which your selected NRA occurs. The additional annual contribution allowed individuals over age 50 may not be utilized during traditional 3 year Catch-Up period.

Authorization

I hereby acknowledge that the information listed above is true and accurate and I irrevocably elect the Normal Retirement Age shown in Section I above. I understand that this election of a Normal Retirement Age for Catch-Up purposes is an once-in-a-lifetime option, even if, in the future, my employer's plan is different or a greater Catch-Up were allowed. I understand I cannot defer underutilized amounts for this form of Catch-Up in the year in which NRA occurs.

Participant Signature:	Date:
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