

YALE UNIVERSITY

MATCHING RETIREMENT PLAN - 403(b)

For C&T and S&M staff and members of the YPBA
(New Enrollees MUST also complete a TIAA-CREF or Vanguard Application)

Name: _____

Title: _____ Employee ID Number: _____

Department: _____ Date of Birth: _____

My choice of an investment company is: TIAA/CREF OR Vanguard

I elect to participate in the Matching Retirement Plan. The amount of salary reduction to be paid to the Plan *per pay period* beginning with the month of _____ will be:

The amount represented by _____% of my salary per pay period.

MAXIMUM ALLOWABLE

I elect to contribute the IRS maximum allowable for this year and subsequent years. I have contributed \$ _____ into a 403(b)/401(k) plan this year through another employer.

OVER AGE 50

For employees age 50 and over, an additional catch-up contribution may be contributed. This amount must not exceed the statutory limitation under IRC 414(v).

I elect to have the catch up contribution.

Such amount will produce a salary reduction contribution not in excess of the employee's statutory exclusion allowance under Sections 403(b), and 415 of the Internal Revenue Code. This includes any contributions made during this calendar year to a previous employer's plan.

This Agreement, which is effective with respect to amounts earned on a weekly or bi-weekly basis, shall be legally binding and irrevocable as to each of the parties hereto while employment continues; provided, however, that either party may terminate or modify this Agreement as of the end of any month, so that it will not apply to salary subsequently earned, by giving at least thirty day written notice of the date of termination.

PARTICIPANT _____
Signature

Date

Employee Service Center Fax Number: 432-5153

Yale

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