

2013 TDA ENROLLMENT

BOARD OF EDUCATION RETIREMENT SYSTEM

OF THE CITY OF NEW YORK

65 COURT STREET

BROOKLYN, NEW YORK 11201-4965

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BEFORE COMPLETING THIS FORM PLEASE READ THE INSTRUCTION SHEET ON THE REVERSE SIDE CAREFULLY

First Name MI Last Name

Social Security Number

Payroll Bank

Address Apt. No.

City State Zip Code

Work Telephone Number Home Telephone Number

OFFICIAL DATE OF RECEIPT

CONTRIBUTION RATE

You may contribute between 1% and 100% of your salary to the TDA Program. Your TDA deductions are based on your contribution rate. Any increase in your pay will result in a higher dollar amount deducted from your paycheck.

%

CONTRIBUTION ALLOCATION

I elect to invest my Contributions to the TDA Program as indicated on the right:

FIXED %

The Fixed and Variable portions can be elected in 5% increments and must total 100%.

VARIABLE %

ACKNOWLEDGEMENT

I hereby acknowledge that the above elections relating to my participation in the BERS Tax Deferred Annuity program are correct and confirmed with my signature below.

Signature:

Date:

STATE OF

COUNTY OF

On this day of , personally appeared before me the said , to me known to be the individual described in and who executed the foregoing document, and he (she) duly acknowledged to me that he (she) executed the same, and the statements contained therein are true.



Notary Public or Commissioner of Deeds
(If you have an official seal, please affix it).

2013 TDA ENROLLMENT

2013 TDA ENROLLMENT INSTRUCTION SHEET

2013 DOLLAR LIMIT - This is the maximum dollar limit you can contribute to the BERS Tax Deferred Annuity (TDA) Program in 2013. Generally, the maximum contribution amount for 2013 is the lesser of 100% of compensation or \$17,500. Those eligible for catch-up contributions (see TDA Booklet) may contribute as much as \$3,000 this year above the \$17,500 limit and are limited to a lifetime total of \$15,000. Members age 50 or older are eligible to contribute an additional \$5,500 in 2013.

CONTRIBUTION RATE - Enter the whole number percentage of your salary that you would like to contribute to the TDA Program. This rate will be applied to your salary, after pension deductions and before taxes are taken, to determine your contribution amount. Use the worksheet Determining Your Contribution Percentage included in the TDA Booklet to assist you in estimating your contribution rate.

You may contribute between 1% and 100% of your salary, limited by your 2013 dollar limit.

CONTRIBUTION ALLOCATION - Please indicate the desired allocation of your contributions. You may allocate 100% of your contributions to the Fixed or Variable Programs, or split your contributions between the programs. Allocations must be in whole percentages (in multiples of 5%). The total percentages must equal 100% or your election cannot be honored.