

Elective Deferral and Vendor Election Form

Plan Name: Collinsville CUSD 10 403(b) Plan

Ref. No. 105840

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|---|--|
| <input type="checkbox"/> To Enroll: Complete All Sections
<input type="checkbox"/> To Change Vendors: Complete Sections A, C and D | <input type="checkbox"/> To Change Contribution Amount: Complete Sections A, B and D
<input type="checkbox"/> To Change Contract/Account Number: Complete <u>All</u> Sections |
|---|--|

Please type or print clearly

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Section A
Your Info

Last Name _____ First Name _____ M. I. _____ Social Security Number (SSN) _____
 Email Address: _____ Daytime Phone Number: (____) _____

Section B
Your Election

- Salary Deferral** – I instruct my employer to deduct _____% or \$_____ of my pay on a pre-tax basis each pay period for investment with the specified vendors below.
 (In the space provided, enter a whole percentage or dollar amount.)
- Roth Contribution** – I instruct my employer to deduct _____% or \$_____ of my pay on an after-tax basis each pay period for investment with the specified vendors below into the designated Roth portion of my account.
 (In the space provided, enter a whole percentage or dollar amount.)

Please indicate how you are making your election as a percentage as a dollar amount

I direct that all future contributions be invested with the following vendor(s). Enter whole percentages in multiples of 1%. i.e., 2%, 3%, 4% or a dollar amount.
 If you have not established the account/contract, you cannot select the new vendor at this time.

Section C
Your Vendor Direction

Vendor Name	Percentage or Amount	Account/Contract Number
AIG Advisor Group		
Ameriprise Financial Services Inc		
Aspire Financial Services, Inc		
AXA Equitable		
Fidelity Investments		
Horace Mann Companies		
ING Reliastar		
Met Life (formerly CitiStreet)		
MetLife		
MetLife Investors		
Putnam Investments		
The Variable Annuity Life Insurance Company		
Thrivent Financial for Lutherans		
Total % or Dollar Amount		

Section D
Sign

By signing this form, I have authorized the Employer to deduct the amount(s) elected from my paycheck and transmit the contributions to the vendors as indicated. I certify that I have established a 403(b) account with the vendors selected above.

_____ Participant _____ Date