



To EZ enroll in the UW 403(b) SRP with TIAA and/or Fidelity complete the information below and return this form to serviceoperations@support.wisconsin.edu for all campuses except Madison and Milwaukee, benefits@ohr.wisc.edu for UW-Madison, or benefits@uwm.edu for UW-Milwaukee. For questions, contact your Institution Benefits Contact.

SCAN ME TO



ACCESS LINKS

IMPORTANT: This form is for new enrollments. For changes to your current deduction with TIAA or Fidelity, submit a Salary Reduction Agreement (SRA) or log into MyUW Portal.

Part 1

Provide your personal information and paycheck effective date.

Effective Date: [ ] As soon as possible (select one) [ ] \_\_\_\_\_ Paycheck (mm/dd/yyyy)

Name: \_\_\_\_\_ Employee ID: \_\_\_\_\_ Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Work Email: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Part 2

Choose your provider(s), election type(s), and amount(s) per pay period.

Select a percentage of pay or a flat dollar amount for before-tax and/or after-tax (Roth) for the provider(s)1 you want to enroll with2. The funds you contribute3 will be invested in the Vanguard Target Retirement Date Fund4 based on your date of birth. TIAA and Fidelity offer the same investment options.

You can change or stop your contribution at any time by submitting a Salary Reduction Agreement to the appropriate email address listed above. You can change your investments by logging into your account(s) or contacting your provider(s)4.

Before-tax Election:

Begin my pre-tax contributions at:

Begin my pre-tax contributions at:

After-tax (Roth) Election:

Begin my Roth contributions at:

Begin my Roth contributions at:

TIAA Plan #100988 [ ] \_\_\_\_\_ % [ ] \$ \_\_\_\_\_ [ ] \_\_\_\_\_ % [ ] \$ \_\_\_\_\_

Fidelity Plan #82828 [ ] \_\_\_\_\_ % [ ] \$ \_\_\_\_\_ [ ] \_\_\_\_\_ % [ ] \$ \_\_\_\_\_

Note: Elections made are taken out of Group 2 pay periods. If you choose 100%, ALL of your salary will be deducted after federal and state deductions. You will have \$0.00 take-home pay.

1 If you elect multiple providers, you will receive separate statements for each provider. 2 A percentage of pay and flat dollar amount cannot be chosen for the same election type under one provider. 3 All contribution amounts are subject to IRS annual contribution limits. 4 For provider contacts and information on Target Retirement Date Funds and investments, visit the UW403(b) SRP website.

Part 3

Provide your signature and date.

I understand that it is my responsibility to select and monitor my investments to make sure they continue to reflect my financial situation, risk tolerance, and time horizon1. I understand I can change my investment election(s) at any time. I understand that I can change my contribution amount(s) at any time by submitting a new Salary Reduction Agreement to my Institution Benefits contact or logging into MyUW Portal. I understand that an account will be set up for me and there may be additional steps I need to take to finish setting up the account2.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

1 You should reexamine your strategy at least annually or whenever your financial situation changes. You may also wish to consult a financial advisor. 2 After your first contribution is posted, you should designate a beneficiary by providing the information online or calling the provider for a form. You will need the social security number, date of birth, and address for each beneficiary.

Return this form to benefits@ohr.wisc.edu (UW-Madison), benefits@uwm.edu (UW-Milwaukee) or serviceoperations@support.wisconsin.edu for all other campuses. Deductions from your paychecks will be processed as soon as administratively possible. For questions, contact your Institution Benefits Contact.

FOR OFFICE USE ONLY Employee ID: \_\_\_\_\_ Pay Period Effective: \_\_\_\_\_ Input By: \_\_\_\_\_ Date Entered: \_\_\_\_\_