

Name: _____ Email: _____
Last First

Social Security No: _____ Birthdate: _____

Prior JHU Service: _____ to _____ Former Name (if applicable): _____

Effective for amounts earned on or after the first day of: _____ PERNR: _____
(month/year) (If unknown; leave blank)

Deduction will be taken based on receipt of complete enrollment: **by the 5th** - second pay date of the month; **by the 20th** - first pay date of the next month.

Section I. Salary Reduction Election Amount Complete only if you are making a first election or changing the amount of your existing salary reduction.

- ___ A. A voluntary amount of \$ _____ **per pay**. The minimum voluntary contribution is \$7.50 per pay (semi-monthly payroll) or \$3.75 per pay (weekly payroll).
- ___ B. The annual **maximum** voluntary amount allowed by the Internal Revenue Code and administratively practical to be taken over the remaining pay periods of the year. Amount adjusts annually.
- ___ C. University contributions only (eligible Faculty & Sr. Staff).

Section II. Determine Your Eligibility

Status	Criteria	University Contribution Eligible	Employee Voluntary Contribution Eligible	Complete Sections Below
Faculty or Sr. Staff	Age: 35 or older OR Service: 2 or more yrs	Yes	Yes	A or A & B
	Age: Under 35 AND Service: less than 2 yrs	No	Yes	B
Support Staff or Bargaining Unit	Service: 2 or more yrs	Yes	Yes	A & B
	Service: less than 2 yrs	No	Yes	B
Visiting Faculty	N/A	No	Yes	B

Section III. Investment Company Allocations Complete below for initial allocation or to change your existing allocation. Elections must be in whole percentages totaling 100%. If establishing an account with a new investment company, please attach their enrollment application. **If application not received, contributions default to the investment company's age-appropriate life cycle fund.**

A. University Contributions		B. Employee Voluntary Contribution	
American Century Investments		American Century Investments	
Fidelity Investments		Fidelity Investments	
		TIAA-CREF Supplemental Annuity	
TIAA-CREF Regular Annuity		TIAA-CREF Regular Annuity	
VALIC		VALIC	
The Vanguard Group		The Vanguard Group	
Total	100%	Total	100%

**403(b) Salary Reduction &
University Contribution Agreement**

Section IV. Prior Pre-tax Contributions (Required for new enrollments)

Select one of the following:

I made no pre-tax contributions through my previous employer in this calendar year.

My total pre-tax contributions through my previous employer in this calendar year were \$ _____.

Section V. Termination of Agreement

Please terminate my salary reduction agreement. I understand that I must sign a new Salary Reduction form if I want to resume voluntary contributions in this plan in the future.

Section VI. Employee Authorization

I hereby authorize Johns Hopkins University (JHU) to reduce my gross salary by the amount indicated in Section I. Such salary reduction amount will be applied by JHU to purchase one or more annuity contracts and/or mutual funds for me as indicated in Section III. When the maximum is elected, I understand that unless I otherwise instruct, this amount will be adjusted periodically to maintain my maximum contribution. This authorization will remain in effect until the Benefits Service Center either receives written notice of termination of this agreement in Section V from me, a new valid salary reduction agreement signed by me, I die, I become totally disabled, or my JHU employment terminates, whichever shall first occur. I agree that I can only withdraw these contributions in accordance with the plan document and the provisions under the annuity contracts and/or mutual funds that I elect to use. I understand this agreement is subject to approval by JHU, and I accept full responsibility for all the effects of this agreement.

Employee Signature

Work Phone

Date

Office Use Only:

Benefits Service Center: _____
Signature

Date

Benefits Shared Services: _____
Signature

Date

Return Form to: JHU Benefits Service Center
1101 E. 33rd Street, Suite D100
Baltimore, MD 21218
FAX: 443-997-5820

Rev. 8/09

BSC/BSS Use Only:

- New Election
- Change in Election
- Termination of Election
- Eligibility Date _____
- Prior Service (552)
- Prior Contribution (510)
- IT41