

# ROGER WILLIAMS UNIVERSITY, FACULTY, AND SCHOOL OF LAW

## *RETIREMENT INVESTMENT COMPANY CHANGE FORM*

Employee Name: \_\_\_\_\_

Employee Number: \_\_\_\_\_

### **CHANGE INVESTMENT COMPANY:**

**\*Transfers are subject to the provisions, restrictions, timelines, and applicable fees of each Company.**

**\*Requested transaction(s) will be processed as soon as administratively possible upon receipt of this form.**

I elect to change remittance of future Matched contributions to:

TIAA

COREBRIDGE

I elect to change remittance of future Unmatched contributions to:

TIAA

COREBRIDGE

BOTH

***\*\*If you are splitting your unmatched contributions between both retirement investment companies, please identify the percentage split allocation below.\*\****

% TIAA

% COREBRIDGE

THIS AGREEMENT shall supersede any prior Salary Reduction Agreement and Vendor Selection Form to the extent that it contradicts and/or changes such Agreement and Form. The Agreement shall be legally binding and irrevocable as to each of the parties hereto while employment continues; provided, however, that either party may terminate this Agreement as of the end of any month, so that it will not apply to salary subsequently paid, by giving at least thirty days written notice of the termination. The Employee agrees that the total contributions on his/her behalf do not exceed the applicable limitations of Sections 403(b), 402(g), 415 or other applicable sections of the Internal Revenue Code of 1986 as amended, and/or that the University/School of Law has no obligation or liability to calculate or verify such limitations. The Employee further agrees that the University/School of Law shall have no liability whatsoever for any loss suffered by the Employee with regard to his/her selection of a retirement invested insurance company contract or associated contract or investments. The Employee understands that the University/School of Law do not warrant any particular tax consequences to the Employee as a result of such participation.

Employee Signature: \_\_\_\_\_

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