

Roberts Wesleyan College

Appendix A

Name (please print, last name first)

Employee ID Number

To: Roberts Wesleyan College/Northeastern Seminary

Employee Tax-Deferment Agreement

Effective_____, I hereby request Roberts Wesleyan College to reduce my taxable wages or salary

by: _____% of my regular salary,

or, by: \$_____ per pay period,

or, ☐ I elect to defer contributions equal to the College's matching contributions to my account

I request that Roberts Wesleyan College make payments in the above amount to TIAA-CREF for credit to my account(s). I understand I can cancel the agreement prior to the start of a pay period so that the future wages or salary will not be reduced. I further understand that my maximum annual contributions cannot exceed the limits prescribed by the Internal Revenue Code (including RWC's Direct Contribution in the case of certain limits). In addition, my allowable contribution may be affected by the following:

- ☐ I have other retirements investments established that I will be contributing to within the current plan year. The total amount of these investments is: \$_____
- ☐ The Economic Growth and Tax Relief Reconciliation Act, passed June 1 2001, allows employers to amend their 403 (b) plans so that participants age 50 and over may contribute an additional \$_____ in the current plan year. I would like to contribute that amount.
- ☐ I plan to contribute the maximum allowed by the Code's general limits, have at least 15 years of service with RWC, and wish to have more information on the possibility of contributing up to \$3000 above the Code's general limits.

Signature

Date

Appendix B

Name (please print, last name first)

Employee ID Number

Employee Voluntary Contribution Request Form

Employee Voluntary Contributions to TIAA-CREF Retirement Choice Annuity Contract (RC), and TIAA-CREF Retirement Choice Plus Annuity Contract (RCP).

Please allocate the amount I elected on Appendix A among the following programs
(Percentages or dollar amounts must total the percentage or dollar amount on Appendix A):

TIAA-CREF
Retirement Choice
Annuity Contract (RC)

_____ % of salary

or: \$ _____

TIAA-CREF
Retirement Choice Plus
Annuity Contract (RCP)

_____ % of salary

or: \$ _____

Signature

Date

Appendix C

Employer Matching Contribution Request Form

Roberts Wesleyan College Direct Contributions to TIAA-CREF Retirement Choice Annuity Contract

TIAA-CREF
Retirement Choice
Annuity Contract (RC)

100% of contribution

Signature

Date