

TIAA ELECTION CHANGE FORM - 2024

Employee ID: _____

Effective Date of Change: _____
(please enter first day of the pay period)

Last Name: _____

First Name: _____

DETERMINING YOUR MAXIMUM CONTRIBUTION

Following are the general maximum limitations if you are increasing your total maximum contribution above the mandatory basic 5%:

General annual maximum limitations effective January 1, 2024 (subject to change annually):

Under age 50: up to \$23,000

Age 50 and above: up to \$30,500 (\$23,000 + \$7,500)

(these limits apply to contributions made above the mandatory 5% contribution)

CHANGING YOUR CONTRIBUTION USING MAXIMUM LIMITATIONS

Mandatory Retirement Plan (RA) employee contribution (mandatory): 5%

(this amount cannot be adjusted)

Additional contributions above your Mandatory contributions require the opening of a Group Supplemental Retirement Annuity (GSRA):

To determine the number of pay periods remaining in 2024, view the payroll schedule in Sundog: Payroll Information>View Payroll Schedule
Note: Calendar year 2024 contains 26 pay periods.

Change my **per pay period** contribution(s) as indicated below. The contribution dollar amount(s) may be changed at any time and as often as needed. You may change your pre-tax contribution, Roth contribution, or both contributions. If you leave the pre-tax or Roth lines blank, and you already have a pre-tax or Roth contribution election on file, the only change will be adding the type and amount of contribution indicated below.

\$ Additional Retirement Plan (ARA) employee contribution: (grandfathered plan; enrolled in 2005 or prior)
(indicate a per pay period dollar amount below the annual maximum limitations listed above)

Pre-Tax

FROM \$: N/A

TO \$: N/A

\$ Group Supplemental Retirement Plan (GSRA) employee contribution:
(indicate a per pay period dollar amount below the annual maximum limitations listed above)

Pre-Tax

FROM \$: _____

TO \$: _____

Roth After Tax

FROM \$: _____

TO \$: _____

I authorize UCAR to make the changes as indicated above. I authorize UCAR to deduct TIAA contributions from my pre-tax earnings until further notice.

Signature: _____

Date: _____

Typed or electronic authorization is acceptable

Nov-23

Please send completed, signed and dated form to:
hrbenefits@ucar.edu