



**Retirement 401 (a) Investment Provider Form**

Employee Name \_\_\_\_\_ Employee A# \_\_\_\_\_

**Future Employer Distribution of University Contributions**

USU will contribute 14.2% of your annual gross earnings into a retirement account, called a 401(a) plan. You may choose TIAA or Fidelity Investments or both, as your retirement program. Providers allow you to designate how the contribution is invested among their respective investment options. If you do not make a selection, the default will be TIAA at %100.

I hereby instruct Utah State University to direct all my future 401(a) Employer Defined Contribution Retirement Plan contributions to an account in my name with the following Investment Providers (select one)

- TIAA - 100% Fidelity - 0%
- TIAA - 90% Fidelity - 10%
- TIAA - 80% Fidelity - 20%
- TIAA - 70% Fidelity - 30%
- TIAA - 60% Fidelity - 40%
- TIAA - 50% Fidelity - 50%
- TIAA - 40% Fidelity - 60%
- TIAA - 30% Fidelity - 70%
- TIAA - 20% Fidelity - 80%
- TIAA - 10% Fidelity - 90%
- TIAA - 0% Fidelity - 100%

**In addition to this form, you are required to enroll online with the TIAA and/or Fidelity 401(a) plan. Step by step guides can be found at: [hr.usu.edu/benefits/retirement/](http://hr.usu.edu/benefits/retirement/)**

I hereby understand and certify as follows:

- I authorize the University to send my retirement contributions as set forth on this form.
- I understand that unless I contact the Investment Provider and request different investment choices, the funds will be invested in a target retirement date life-cycle fund based on my current age and anticipated retirement at age 65. I understand that I may change my investment options by contacting the Investment Provider.
- I understand that this change only affects money that will be contributed by the University after this form is processed in the Human Resources Department. If I wish to transfer funds in my account from one provider to another, I must contact the new provider to initiate the transfer process.
- I understand if my FTE drops below 50%, or if I terminate my employment with the University, I will no longer be eligible for contributions, but that my account will be maintained by my selected Provider(s) and I may continue to make investment choices.
- **I understand that I must enroll online with the retirement vendor.**

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_