

Acknowledgment of Retirement Account Options & Election Form

Please complete this form within 30 days of hire

401(a) Option:

For new employees not previously enrolled in Utah Retirement System with Utah State University, 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 you retirement program. You designate how this contribution is invested among the investment options by completing the next page called the 401(a) Investment Provider Form.

New employees are required to log in to TIAA and/or Fidelity in order to register in the employer funded retirement 401(a) plan.

Utah Retirement System option:

New employees who previously worked for Utah State University and were enrolled in Utah Retirement Systems while working for the University, **must** remain in URS.

For those enrolled in Utah Retirement systems prior to July 2011 you are considered **Tier 1**, for those enrolled after July 2011 you are considered **Tier 2**.

- I was enrolled in URS previously while working for Utah State University
- I was enrolled in URS with another employer and wish to re-enroll with URS
- I have never enrolled in URS with Utah State University and wish to be enrolled in the 401(a) retirement plan

I understand that my retirement account options are the 401(a) if I have not previously enrolled in URS while working for Utah State University or if I have previously enrolled in URS while working for Utah State University, than I must elect URS. I acknowledge my election above and understand this can not change during my employment with Utah State University.

Signature:

Date: