

Plumbers' Retirement Savings Fund, Local 130, UA

401(k) Enrollment and Deferral Election Form as of January 1, 2024

Print or type all information. **This election form must be returned to your Employer and the Fund Office.**

EMPLOYER NAME

DATE OF HIRE

Enroll Here



Get started on saving for retirement by filling out your personal information.

YOUR FIRST NAME, MI, LAST NAME

SOCIAL SECURITY #

DATE OF BIRTH

STREET ADDRESS

CITY, STATE

ZIP

EMAIL ADDRESS

TELEPHONE #

Save Here



Your hourly pre-tax contribution

Choose your pre-tax contribution amount, subject to the limits set forth below.

Please Note: 1) Changes or new elections for current employees will be recognized after the next June 1st following receipt of a new election form. For example, an election change in March 2024 will not be effective until after June 1, 2024. Election Forms will not be accepted after July 1st. 2) New eligible employees may enroll following receipt of a new election form; and 3) You can elect to stop deferring at any time by writing \$0 in the box below. You should notify your Employer and the Fund Office if you stop deferring.

Enter the dollar amount of pay (\$ per hour) that you elect to contribute as a pre-tax contribution. You may choose an amount to defer on a pretax basis based on \$.50 increments (\$0.50, \$1.00, \$1.50, \$2.00, \$2.50, \$3.00, \$3.50, \$4.00, \$4.50, \$5.00, \$10.00, etc.).

I hereby elect to have pre-tax contributions made to the Fund and authorize my Employer to withhold the amount of pay indicated above for each contribution period after the effective date of this authorization, provided I have met the eligibility requirements under the Plan. I understand and agree that this election will continue in effect until changed by my completion of a new "401(k) Deferral Election Form".

If my pre-tax contributions in any year exceed those permitted by the IRS, the excess (plus any credited earnings) may be returned to me as taxable income.

Authorization

I hereby authorize my Employer to implement my elections, as indicated on this form. I understand that reasonable procedures will be followed to confirm that my instructions are genuine.

I certify that the address and information provided on this form are correct.

YOUR SIGNATURE

DATE

IMPORTANT!!

A COPY OF THIS DEFERRAL ELECTION FORM MUST BE RETURNED TO YOUR EMPLOYER AND THE FUND OFFICE. Email: 401k@ualocal130funds.com or mail to: Plumbers' Retirement Savings Fund, Local 130, UA, 1340 W. Washington Blvd., Third Floor Chicago, IL 60607