

Retirement Vendor Information Form

R12

Change in Allocation – 403(b) Basic Retirement Plan (Participants Receiving 12% contribution)

Name: _____ Campus ID # _____

Employee Group: _____ Title: _____

1. This is my current allocation:

TIAA-CREF 1 2 3 4 5 6 7 8 9 10 11 12

Fidelity Investments 1 2 3 4 5 6 7 8 9 10 11 12

2. I would like to change my allocation as noted below – (This change in vendor designation will take effect as of the first of the your next available pay)

TIAA-CREF 1 2 3 4 5 6 7 8 9 10 11 12

Fidelity Investments 1 2 3 4 5 6 7 8 9 10 11 12

A vendor application *must* accompany this form if enrolling with a vendor for the first time

Employee Signature: _____ Date: _____

For Benefits Use Only:

Pers #:	Payroll cycle:	App on file:	Authorized:	Entered:
Z Code IT 35:			Auth Date:	Date: