



CHRISTIAN BROTHERS RETIREMENT SAVINGS PLAN

403(b) DEFERRAL CHANGE FORM WITH ROTH OPTION

Section A: Employee Information

Plan Name: **CHRISTIAN BROTHERS RETIREMENT 403(b) SAVINGS PLAN (83339)**

Name:

Soc. Sec. #:

Address:

Birth Date:

City, State, Zip:

Location Code:

Section B: Change in Contribution Amounts

% Deferral _____ (indicate from 1% to 100%) OR _____ (whole dollar amount)

% Roth _____ (indicate from 1% to 100%) OR _____ (whole dollar amount)

☐

I do not wish to participate in the Christian Brothers Retirement Savings Plan.

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I wish to suspend my contributions to the Plan.

Note: Refer to Summary Plan Description (SPD) for contribution limits and restrictions on changing contributions.

Section C: Signature

Employee's Signature: _____ Date: _____

Reviewed by Employer: _____ Date: _____

Effective Date (to be completed by Employer): _____

Return this form to your Employer's Human Resources Department.

Attention HR Department: Please keep this form for your records.