



# CHRISTIAN BROTHERS RETIREMENT SAVINGS PLAN

## 403(b) DEFERRAL CHANGE FORM WITH ROTH OPTION

### Section A: Employee Information

Plan Name:

Name:  Soc. Sec. #:

Address:  Birth Date:

City, State, Zip:

Location Code:

### Section B: Change in Contribution Amounts

Roth

Roth	Salary Reduction Contribution	Age 50+ Catch-up Contribution
% (from 1% to 100%)		
Dollar Amount (\$)		

Pre-Tax Deferral

Pre-tax	Salary Reduction Contribution	Age 50+ Catch-up Contribution
% (from 1% to 100%)		
Dollar Amount (\$)		

Age 50+ Catch-Up Contributions will be made on a Roth basis for anyone who has FICA wages in 2025 that exceed \$150,000 (or such indexed amount in future years) regardless of a formal election.

I wish to cease 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.