

# DEFERRAL PERCENTAGE ELECTION/CHANGE FORM

*This form can be used to change your current deferral election in your Plan, make a separate deferral election on a bonus pay (if your plan allows), and/or to elect to make Catch-Up contributions if you have or will attain age 50 in the current calendar year. Please complete all applicable sections in their entirety. Upon completion, please send this form to your HR department to coordinate your payroll deductions.*

<b>Participant Information</b> (Please print clearly and complete all appropriate fields)	
Plan Name	
Participant Name	Social Security Number
<b>Deferral Percentage Change Election</b>	
As a current participant in the above referenced retirement plan, I wish to make the following change to my current deferral election. I understand that the 2024 IRS contribution limit per individual is \$23,000. If I am over age 50 before the end of the current year, and the dollar amount or percentage I elect below will exceed the \$23,000 limit this year, I elect to continue my contributions up to an additional \$7,500 as catch-up contributions.	
<input type="checkbox"/> I would like ____% or \$ ____ of my compensation withheld each pay and contributed to my account on a pre-tax basis.	
<input type="checkbox"/> I would like to contribute the maximum amount annually as allowed by the IRS including catch-up contributions (if applicable) until this election is revoked.	
<input type="checkbox"/> I would like to stop contributing to the retirement plan immediately.	
This change is effective beginning ____ (please refer to your Summary Plan Description for allowable dates)	
<b>Separate Deferral Election for a Bonus</b> (by default, if no withholding election is made on a bonus, your normal withholding will apply)	
<input type="checkbox"/> I choose NOT to have ANY amounts withheld from ANY bonuses paid to me moving forward until elected otherwise.	
<input type="checkbox"/> I choose to have my standard payroll withholding apply to any and all bonuses paid to me moving forward until elected otherwise.	
<input type="checkbox"/> I choose to make a special deferral, one-time withholding election for the bonus dated ____ as follows:	
<input type="checkbox"/> I would like ____% or \$ ____ of this bonus to be withheld and contributed to my account on a pre-tax basis.	

*I hereby certify that I have made the above elections voluntarily and independently, and that neither my Employer nor any Fiduciary of this plan has influenced my decision.*

\_\_\_\_\_  
Participant Signature

\_\_\_\_\_  
Date