

## Hamilton Southeastern Schools

### Employer matching 403(b) Retirement Plan

Hamilton Southeastern Schools has established an Employer-matching tax deferred 403(b) retirement savings program with Voya Financial. For the 2023-24 school year, **Hamilton Southeastern Schools will contribute up to 5% of an employee's salary as a matching contribution.** Employee contributions are made pre-tax.

#### FAQs

##### Who is Eligible?

All employees of Hamilton Southeastern Schools are immediately eligible upon employment.

##### When is the enrollment period?

Employees may enroll any time throughout the year. Contributions will begin the first pay period of the month after online enrollment is completed.

##### What are the contributions limits?

Employees may contribute any amount up to the IRS 2023 limits of \$22,500 for employees age 18-49 or up to \$30,000 employees age 50+. Hamilton Southeastern Schools will match up to 5% of an employee's salary to their account. Contribution amounts may be changed any time throughout the year.

##### What is the vesting period?

You are fully vested the first day of the contribution.

##### What happens if I resign/termination of my employment at Hamilton Southeastern?

The account remains your account and you are fully vested. You may leave the account in place and the balance will fluctuate as your chosen investments move with the market changes. You may also move it to another employer plan (if that plan allows for rollovers), another tax qualified plan, an IRA, or withdraw your savings. Withdraws may be subject to income taxes and tax penalties.

##### How do I enroll?

To self-enroll:

Visit <http://enroll.voya.com>

Plan Number = **664115**

Verification Number = **037993**

For assistance with enrolling or if you have other questions regarding the plan:

If your school's address is west of I-69, contact:

**Michael Zahm**-Voya Financial

[Michael.zahm@voyafa.com](mailto:Michael.zahm@voyafa.com)

317-442-3230

If your school's address is east of I-69, contact

**Brian Libich**-Voya Financial

[blibich@voyafa.com](mailto:blibich@voyafa.com)

317-698-5267