

Oconee County Schools

Retirement Savings Plan Participation Change Form

LAST NAME

FIRST NAME

M.I.

PHONE

Employees with at least 50% status, hired after 10/1/1993, make a mandatory pre-tax contribution of 4.5% of compensation to the OCS Retirement Savings Plan. OCS also contributes 4.5% on behalf of the eligible employee.

This form is for making changes to voluntary contributions.

Salary reduction changes must be submitted prior to the beginning of the pay period for which changes are being requested. Change requests received after the beginning of the effective pay period will be made the next available pay period.

Complete the section below to make changes to your voluntary contributions.

Please make my change effective _____ 20_____
Month Year

Please withhold the following percentage(s) from each pay period:

Pre-Tax 403b: _____ % ROTH 403b: _____ % Pre-Tax 457b: _____ %

Under Section 403(b) and 457(b) of the Internal Revenue Code an employee may enter into an agreement with his/her employer to amend his/her salary contract. Therefore, it is hereby agreed by the undersigned that my monthly compensation shall be reduced by the amount so indicated.

It is further agreed by said employee and employer that this agreement will remain in full force and effect during the continued employment of the said employee except as it may be amended or terminated in writing.

SIGNATURE

SOCIAL SECURITY NO.

DATE

Return this form to: Cannon Financial Strategists, Inc.
649-8 S. Milledge Ave., Athens, GA 30605

Phone 706-548-3422
Fax 706-548-4526