

G _____
Last 4 Digits of SSN Employee Identification Number

Please submit this form via fax to (718) 935-4124 or (718) 935-3830.

Prefix

Mr Mrs Ms Miss Other _____

OFFICIAL DATE OF RECEIPT

First Name

M.I. Last Name

Gender

Marital Status

Home/Legal Address

Apt. No.

City

State

Zip Code

Mailing Address (if different from above)

Apt. No.

City

State

Zip Code

Primary Telephone Number

Secondary Telephone Number

Is this a Cell # <input type="checkbox"/> Yes <input type="checkbox"/> No	Is this a Cell # <input type="checkbox"/> Yes <input type="checkbox"/> No
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Work Telephone Number

_____ Extension _____

REQUIRED – Primary Email

Secondary Email

2022 TDA ENROLLMENT





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CONTRIBUTION RATE

You may contribute between 1% and 85% of your salary to the TDA Program. Your TDA deductions are based on your contribution rate. Any increase in your pay will result in a higher dollar amount deducted from your paycheck.

%

CONTRIBUTION ALLOCATION

I elect to invest my Contributions to the TDA Program as indicated on the right:

FIXED %

The Fixed and Variable portions must be elected in 5% increments and must total 100%.

VARIABLE %

TOTAL %

ACKNOWLEDGEMENT

I hereby acknowledge that the above elections relating to my participation in the BERS Tax Deferred Annuity program are correct and confirmed with my signature below.

DO NOT SIGN OR DATE UNLESS IN FRONT OF A NOTARY

Signature: _____

Date: _____

State of _____ County of _____

On this _____ day of _____ in the year 20 _____

personally appeared before me the said _____

to me known to be the individual described in and who executed the foregoing document, and he (she) duly acknowledged to me that he (she) executed the same, and the statements contained therein are true.

Signature of Notary Public or Commissioner of Deeds

Affix official seal in the box below



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**2022 TDA ENROLLMENT
INSTRUCTION SHEET**

2022 DOLLAR LIMIT — This is the maximum dollar limit you can contribute to the BERS Tax Deferred Annuity (TDA) Program in 2022. Generally, the maximum contribution amount for 2022 is the lesser of 85% of compensation or \$20,500. Those eligible for catch-up contributions (see TDA Booklet) may contribute as much as \$3,000 in 2022 above the \$20,500 limit and are limited to a lifetime total of \$15,000. Members age 50 or older are eligible to contribute an additional \$6,500 in 2022.

CONTRIBUTION RATE - Enter the whole number percentage of your salary that you would like to contribute to the TDA Program. This rate will be applied to your salary, after pension deductions and before taxes are taken, to determine your contribution amount. Use the worksheet Determining Your Contribution Percentage included in the TDA Booklet to assist you in estimating your contribution rate.

You may contribute between 1% and 85% of your salary, limited by your 2022 dollar limit.

CONTRIBUTION ALLOCATION — Please indicate the desired allocation of your contributions. You may allocate 100% of your contributions to the Fixed or Variable Programs, or split your contributions between the programs. Allocations must be in whole percentages (in multiples of 5%). The total percentages must equal 100% or your election cannot be honored.

PLEASE SIGN THE BOTTOM OF THE TDA ENROLLMENT FORM, HAVE IT NOTARIZED AND RETURN IT TO BERS. IF YOUR FORM IS NOT COMPLETED CORRECTLY, IT WILL BE RETURNED TO YOU AND NO ACTION WILL BE TAKEN ON YOUR ACCOUNT.

Please submit your 2022 TDA Enrollment application by fax to (718) 935-4124 or (718) 935-3830.

