

TAX DEFERRED ANNUITY PLAN AGREEMENT: GENERAL RULES AND PROCEDURES

1. Please read the entire Agreement carefully before completing and signing. This completed form is to be returned to your Office of Human Resources indicated below.
2. If you are already participating in the Tax Deferred Annuity Plan and wish to increase the percentage of your contribution, indicate the new percentage amount to be tax deferred, **not the amount of the increase**.
3. You may only make contributions into a Regular Retirement Annuity (RA) if you are currently doing so. Otherwise, your contributions will be remitted to a Group Supplemental Retirement Annuity (GSRA).
4. If you do not have a Group Supplemental Retirement Annuity (GSRA) contract with TIAA-CREF, the *Enrollment Form for TIAA and CREF Group Supplemental Retirement Annuity Certificates* must be completed before this Agreement is effective and before payroll reductions will be made.
5. You may change the investment allocation amongst TIAA and CREF funds at any time during the year by contacting TIAA-CREF directly at 1-800-842-2776.
6. If you have participated in a tax-deferred annuity plan (such as a 403(b) plan) outside the University in this calendar year, you should contact your tax advisor to ensure that you do not exceed individual IRS tax deferral limits for the calendar year.
7. It is your responsibility to contact your Office of Human Resources to have your maximum contribution recalculated in the event of a change in your employment status.
8. If you have elected a percentage of base salary, as your salary increases your contribution may increase. If you have elected the maximum as computed by TIAA-CREF, your contribution may increase as the IRC statutory limitations under Section 402(g) increase.
9. If this Agreement form is received after the applicable payroll period closes, the Office of Human Resources may change the Agreement's effective date.
10. This Agreement will continue as specified on the reverse side unless modified or terminated by you.
11. Once this Agreement is received, it is a legally binding contract between you and Princeton University.

IF YOU HAVE ANY QUESTIONS PLEASE CONTACT YOUR OFFICE OF HUMAN RESOURCES:

Main Campus Faculty and Staff

Office of Human Resources

1 New South

609-258-9109

Email: erichard@princeton.edu

PPPL Staff

Division of Human Resources

Lyman Spitzer Building, MS 33

609-243-2101

Email: kmastrom@pppl.gov

Please make a copy for your records before you return the completed and signed form to your Office of Human Resources.