



# EMPLOYEE ENROLLMENT FORM

## Employee Information:

|                 |            |        |              |
|-----------------|------------|--------|--------------|
| Employer:       |            |        |              |
| Name:           |            | SSN:   |              |
| Address:        |            |        |              |
| City:           |            | State: | Zip:         |
| Birth Date:     | Hire Date: |        | Rehire Date: |
| Marital Status: | Phone:     | Email: |              |

## Employee Contribution Election:

You can defer up to 100% of Compensation (subject to other deductions from your pay), not to exceed the maximum IRS calendar year dollar limit. If you have contributed the maximum dollar amount and if you are age 50 or older at any time during the calendar year, you can contribute an additional catch-up contribution. See limits below. By making your election below, you agree to reduce your compensation and direct the employer to deduct from your pay, the percentage or dollar amount of your compensation indicated below.

### **Elect a percentage or dollar amount of your compensation.**

\_\_\_\_\_% If you are under age 50 or you do not wish to contribute the additional catch-up contribution, the limit is \$20,500 for 2022.  
\$\_\_\_\_\_

**OR**

\_\_\_\_\_% If you are **age 50 or older and you want** to contribute the additional catch-up contribution, the limit is \$27,000 for 2022.  
\$\_\_\_\_\_

\_\_\_\_\_ I decline to make a salary deferral contribution at this time.

**If you wish to classify all or part of your deferrals as Roth 401(k) after-tax contributions, please check the applicable box.**

- All deferrals elected above are Roth 401(k) after-tax funds.
- Deferrals elected above are split between Roth 401(k) after-tax and traditional 401(k) pre-tax as follows:

Roth 401(k) After-tax \_\_\_\_\_% or \$\_\_\_\_\_

Traditional 401(k) Pre-tax \_\_\_\_\_% or \$\_\_\_\_\_

**PARTICIPANT'S SIGNATURE** \_\_\_\_\_ **DATE** \_\_\_\_\_

**Return this form to your Office Manager.  
The Office Manager will send a copy to UPAL.**

|  |                                 |                        |                  |
|--|---------------------------------|------------------------|------------------|
| UPAL OFFICE USE ONLY – Initial when complete |                                 |                        |                  |
| _____ StartRight                             | _____ Contribution Receipts Log | _____ Transmittal File | _____ Email List |