



Iowa Retirement Investors' Club (RIC) 457/401a Plans

Look forward to retirement!

Waukee CSD RIC Account Form

Personal Information

Name, Social Security #, Address, City, State, Zip, Birth Date, Phone (work), Phone (home), Phone (cell)

Account Status

New account, Change to existing account

457 Payroll Deduction Election

The combined amount of all 457 pretax and Roth contributions in a tax year is limited to the IRS annually declared maximum contribution limits

Table with 5 columns: Provider, Corebridge Financial, Empower, Horace Mann, Voya. Rows for Pretax, Roth, and Stop deductions.

Effective date: Changes are effective for the next available paycheck unless a future effective date is indicated.

Begin as of, Future effective date (if desired), 1 check only, Final check

Provider Transfers

For transfers between providers, complete and submit the Transfers Between RIC Providers Form.

Participant Signature

I authorize my employer to process these requests. I have access and agree to the terms and conditions of the Iowa Retirement Investors' Club (RIC) as disclosed in the Plan Document.

X Participant Signature, Date

Form Submission

RIC Account Form: Forward to your payroll office (shown below) | Provider account forms: Forward to the provider

Agent Use Only (Not required, but preferred) I am authorized to open RIC accounts for this employee. I verify 457/401a accounts have been established.

Print Agent Name, Agent Signature, Agent Phone Number, Date



Visit the RIC website at https://das.iowa.gov/RIC/PSE for full program details; select Your Plan Details from the left menu to access the RIC At-A-Glance and plan options specific to your employer's 457/401a plans.

Payroll Office

Date Received, Paycheck Effective Date, Name

RIC Use Only

Date Pended, Entered, Checked

Waukee Community School District

560 SE University Ave Waukee, IA 50263 (515) 987-5161 x4506 Fax (515) 987-2701 Iowa Retirement Investors' Club (RIC) 866-460-4692 toll free https://das.iowa.gov/RIC