

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

City of Polk City RIC Account Form

Personal Information	Name	Social Security #			ed last 4 digits only	
	Address		City	State	Zip	
	Birth Date	Phone (work)	Phone (home)	Phone (cell)		
Account Status	☐ New account (Must open 457/401 accounts with RIC provider) ☐ Change to existing account (This form replaces last completed deduction replac				npleted deduction request)	
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 (see https://das.iowa.gov/RIC/PSE/contributions).					
	Provider	Corebridge Financial				
	Per paycheck amount & taxation	Pretax \$ Pretax % Roth \$ Roth % Stop deductions				
	Frequency	All checks (26 annually)				
	Effective date: Changes are effective for the next available paycheck unless a future effective date is indicated.					
	Future effective date (if desired) Begin as of					
Participant Signature	I authorize my employer to process these requests. I have access and agree to the terms and conditions of the lowa Retirement Investors' Club (RIC) as disclosed in the Plan Document. I have established 457 and 401a accounts with a RIC provider. I understand that the total of all 457 contributions made in the calendar year must not exceed the federal limits as required by the Internal Revenue Code section 457. I understand that withdrawals may only be made upon termination of employment or qualification for an in-service distribution. X					
Form	Participant Signature Date					
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.					stablished.	
Print Agent Name		Agent Signature	ρ	agent Phone Number	Date	
Visit the RIC website at https://das.iowa.gov/RIC/PSE for full program details; select Employer Plan Details to access the RIC At-A-Glance and plan options specific to your employer's 457/401a plans.						
Payroll Office Date Received:				RIC Use Only Date Pended:		
Paycheck Effective Date:				Entered:		
Name:			Checked:			