



Retirement Investors' Club (RIC)

457/401a Plans

Lee County RIC Account Form

Personal Information	Name _____ Last _____ First _____ MI _____ Social Security # _____ Existing accounts need last 4 digits only				
	Address _____ City _____ State _____ Zip _____				
	Birth Date _____ Phone (work) _____ Phone (home) _____ Phone (cell) _____				
Account Status	<input type="checkbox"/> New account (Must open 457/401 accounts with RIC provider) <input type="checkbox"/> Change to existing account (This form replaces last completed 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 (Formerly AIG)	Empower	Horace Mann	Voya
	Per paycheck amount & taxation	Pretax \$ _____ Roth \$ _____ <input type="checkbox"/> Stop deductions	Pretax \$ _____ Roth \$ _____ <input type="checkbox"/> Stop deductions	Pretax \$ _____ Roth \$ _____ <input type="checkbox"/> Stop deductions	Pretax \$ _____ Roth \$ _____ <input type="checkbox"/> Stop deductions
	Frequency	All checks (26 annually)			
	Effective date: Changes are effective for the next available paycheck unless a future effective date is indicated. <input type="checkbox"/> Begin as of _____ Future effective date (if desired) <input type="checkbox"/> 1 check only _____ <input type="checkbox"/> 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 . 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 .				
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 Employer Plan Details* to access the *RIC At-A-Glance* and plan options specific to your employer's 457/401a plans.

Payroll Office	RIC Use Only
Date Received: _____	Date Pended: _____
Paycheck Effective Date: _____	Entered: _____
Name: _____	Checked: _____

Lee County

933 H Ave ■ Fort Madison, IA 52627 ■ (319) 371-3542 ■ Fax (319) 372-7857
Iowa Retirement Investors' Club (RIC) ■ 866-460-4692 (toll free) ■ <https://das.iowa.gov/RIC>