



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

Look *forward* to retirement!

**Coon Rapids Municipal Utilities  
RIC Account Form**

<b>Personal Information</b>	Name _____ Social Security # _____ <small style="display: flex; justify-content: space-between; width: 100%;"> <span>Last First MI</span> <span>Existing accounts need last 4 digits only</span> </small> Address _____ City _____ State _____ Zip _____ Birth Date _____ Phone (work) _____ Phone (home) _____ Phone (cell) _____						
<b>Account Status</b>	<input type="checkbox"/> <b>New account</b> (Must open 457/401 accounts with RIC provider) <input type="checkbox"/> <b>Change to existing account</b> (This form replaces last completed deduction request)						
<b>457 Payroll Deduction Election</b>	<p>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 <a href="https://das.iowa.gov/RIC/PSE/contributions">https://das.iowa.gov/RIC/PSE/contributions</a>).</p> <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:20%;">Provider</th> <th style="width:20%;">Voya</th> </tr> </thead> <tbody> <tr> <td rowspan="3" style="vertical-align: top;"><b>Per paycheck amount &amp; taxation</b></td> <td>Pretax \$ _____</td> </tr> <tr> <td>Roth \$ _____</td> </tr> <tr> <td><input type="checkbox"/> Stop deductions</td> </tr> </tbody> </table> <p><b>Effective date:</b> Changes are effective for the next available paycheck unless a future effective date is indicated.</p> <p style="text-align: right;"> <input type="checkbox"/> Begin as of _____  <input type="checkbox"/> 1 check only _____  <input type="checkbox"/> Final check _____         </p> <p>Future effective date (if desired) _____</p>	Provider	Voya	<b>Per paycheck amount &amp; taxation</b>	Pretax \$ _____	Roth \$ _____	<input type="checkbox"/> Stop deductions
Provider	Voya						
<b>Per paycheck amount &amp; taxation</b>	Pretax \$ _____						
	Roth \$ _____						
	<input type="checkbox"/> Stop deductions						
<b>Participant Signature</b>	<p>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.</p> <p><b>X</b> _____  <small>Participant Signature Date</small></p>						
<b>Form Submission</b>	<p><b>RIC Account Form:</b> Forward to your payroll office (shown below)           <b>Provider account forms:</b> Forward to the provider</p>						

**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.

<p><b>Payroll Office</b></p> Date Received: _____ Paycheck Effective Date: _____ Name: _____	<p><b>RIC Use Only</b></p> Date Pended: _____ Entered: _____ Checked: _____
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