



Iowa Retirement Investors' Club (RIC)
457/401a Plans
 Look *forward* to retirement!

Johnson County
RIC Account Form



Personal Information

Name _____ Social Security # _____
Last First MI Existing accounts need last 4 digits only

Address _____ City _____ State _____ Zip _____

Birth Date _____ Phone (work) _____ Phone (home) _____ Phone (cell) _____

457 Payroll Deduction Election
Deductions can be sent to only one provider at a time.

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>).

Choose only 1 Provider	AIG	Empower	Horace Mann	Voya
Deduction amount & taxation (per paycheck)	Pretax \$ _____ <input type="checkbox"/> Stop deductions	Pretax \$ _____ <input type="checkbox"/> Stop deductions	Pretax \$ _____ <input type="checkbox"/> Stop deductions	Pretax \$ _____ <input type="checkbox"/> Stop deductions

Deduction frequency: 26 checks/year (all checks)

Effective date: Changes affect the 1st available check of the month following receipt of this form unless a future effective date is indicated.

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

Provider Transfer Request
Account must be established with receiving provider.

Transfer: 100% Amount \$ _____

From: AIG Empower Horace Mann Voya Other _____

To: AIG Empower Horace Mann Voya

Make check payable to: _____

FBO: Participant, Plan #: _____

Mail to: _____

RIC administrator signature: X _____ Date

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.

X _____
Participant Signature Date

Form Submission

New accounts: *Provider account forms:* Forward to the provider
RIC Account Form: Forward to the Johnson County Auditor's Office

Existing account changes: *RIC Account Form:* Forward to the Johnson County Auditor's Office

Agent Use Only (Not required, but preferred)

I am authorized to open accounts for this employee and verify that the participant has established 457/401a accounts with the provider shown below.

Print Agent Name _____ Agent Signature _____ Agent Phone Number _____ Date _____

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

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.