



Iowa
Retirement Investors' Club (RIC)
Look forward to retirement!

State Employee RIC Account Form

Personal Information

Last name _____ First name _____ M.I. _____ Social Security # _____
Existing accounts use last 4 digits only

Address _____ City _____ State _____ Zip _____

Birth date _____ Agency/Dept _____ Phone (work) _____ Phone (mobile or home) _____

Account Status

New account (Must open 457/401 accounts with RIC provider) **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/SOI/contributions>).

TOTAL PER CHECK deduction amount	AIG	Empower*	Horace Mann	Voya
Pretax \$ _____/check	Pretax \$ _____/check	Pretax \$ _____/check	Pretax \$ _____/check	Pretax \$ _____/check
Roth \$ _____/check	Roth \$ _____/check	Roth \$ _____/check	Roth \$ _____/check	Roth \$ _____/check
<input type="checkbox"/> Stop deductions	<input type="checkbox"/> Stop deductions	<input type="checkbox"/> Stop deductions	<input type="checkbox"/> Stop deductions	<input type="checkbox"/> Stop deductions

Deduction frequency (select one):
 12 checks/year 1st check or 2nd check
 24 checks/year
 26 checks/year (all checks)

Effective date: *Changes affect the 1st available check of the month following receipt of this form unless a later date is indicated here. Stop requests are immediate.*
 Begin as of _____ (MM/DD/YYYY)
 1 check only _____ (MM/DD/YYYY)
 Final check _____ (MM/DD/YYYY)

Transfers Between RIC Providers

Transfer: All accounts Acc't # _____
From: AIG Empower* Horace Mann Voya _____
To (existing account): AIG Empower* Horace Mann Voya

Make check payable to: _____ FBO: Participant, Plan #: _____
 Mail to: _____
 RIC administrator signature: _____ Date: _____

Authorization

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.

Today's date _____

New account (or Transfer Between RIC Providers) **Existing account**

_____ **OR** _____

Participant Signature (Required for new accounts and RIC provider transfers) Employee ID# acts as signature Participant Signature

Advisor Use (For new accounts opened with an advisor): I am authorized to open accounts for this employee. The employee has established 457/401a accounts with

RIC Provider _____ Print Agent Name _____ Agent Signature _____ Agent Phone Number _____

Form Submission
 Email: ric@iowa.gov | Fax: 515-281-5102 | Mail: DAS-HRE, Attn: RIC ▪ 1305 E Walnut ▪ Des Moines, IA 50319

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

*Empower – formerly MassMutual Retirement

