



Port Washington-Saukville School District

TSA Providers (403b)

American Funds (No Roth)

Group #60872

Enrollment done via paper application

Phone: (800) 421-4225, Ext. 45

Equitable (Previously AXA)

Unit #008253-001

<https://equitable.com/>

Phone: (800) 292-4636

Fidelity Funds

#86940

<https://nb.fidelity.com/public/nb/default/home>

Phone: (800) 343-3548

Voya Investment Management

Group #VT0399

Verification Code #: 090013

<https://enroll.voya.com>

Phone: (800) 584-6001

WEA Member Benefits

Unit #0070

weabenefits.com/enroll

Phone: (800) 279-4030 Ext. 8577

Deferred Compensation Plan (457b)

Wisconsin Deferred Compensation

Plan #: 98971-01

Division #: P5088

Phone: (877) 457-9327 (Call Empower to request a plan enrollment code)

wdc457.org (Enroll after receiving a plan enrollment code)



Port Washington-Saukville School District
 100 West Monroe Street
 Port Washington, WI 53074



403(b) Tax-Sheltered Annuity Plan

Name _____

Payroll Effective Date _____

Enroll Change Cancel

*Contribution max for 2024 is \$23,000.00
 *If age 50 or over, catch-up contribution is \$7,500.00
 *Subject to a 10% penalty for early withdrawal before age 59 1/2

Pretax dollars means taxes are not paid on **contributions** in the year made, but defers taxation until withdrawals are made from plan during retirement.

After-tax dollars (Roth) means taxes are paid on contributions in the year made, but withdrawals from plan are tax free during retirement.

Maximum contribution between 403(b) and 457(b) plan is \$46,000.00, excluding catch-up contribution.

Select (up to 2 funds):

American Funds (No Roth)	Account#: _____	<input type="checkbox"/> Pretax	Amount per Payroll _____
Equitable (AXA)	Account#: _____	<input type="checkbox"/> Pretax <input type="checkbox"/> Roth	Amount per Payroll _____
Fidelity Funds	Account#: _____	<input type="checkbox"/> Pretax <input type="checkbox"/> Roth	Amount per Payroll _____
Voya Investment	Account#: _____	<input type="checkbox"/> Pretax <input type="checkbox"/> Roth	Amount per Payroll _____
WEA Member Benefits	Account #: _____	<input type="checkbox"/> Pretax <input type="checkbox"/> Roth	Amount per Payroll _____

- Account must be set up directly by the employee with one of the funds above prior to payroll deduction (Instructions attached)
- Contributions can be changed throughout the year by completing a new form
- I hereby authorize Port Washington-Saukville School District (PWSSD) to withhold amount indicated above per payroll
- Agreement shall be effective as of the first pay date unless otherwise indicated above
- PWSSD shall withheld and remit employee contributions to the selected fund within 3 business days
- A signed, completed enrollment form must be returned to the district office to activate payroll deduction

I understand and agree deferral limitations are set forth by the IRS and agree my contributions under this election do not exceed IRS limits. Further, I confirm any deferrals in excess of the general limitations are due to being eligible for the "catch-up" election, which allows for contributions in excess of the \$23,000.00 limit. I release PWSSD from all claims in the event the fund under this agreement fails to qualify for preferential tax treatment under Code Section 403(b). I understand PWSSD assumes no responsibility, actual or implied, with respect to the calculation of contribution or limits. Please consult your tax advisor or the fund directly for code-specific questions.

Signature:

Date:

If you have additional questions regarding plan administration, please contact Erin Maass at (262) 268-6085.



Port Washington-Saukville School District
 100 West Monroe Street
 Port Washington, WI 53074



457(b) Tax-Sheltered Annuity Plan

Name	*Contribution max for 2024 is \$23,000.00 *If age 50 or over, catch-up contribution is \$7,500.00 *No penalty for early withdrawal before age 59 1/2
Payroll Effective Date	Pretax dollars means taxes are not paid on contributions in the year made, but defers taxation until withdrawals are made from plan during retirement.
Enroll <input type="checkbox"/> Change <input type="checkbox"/> Cancel <input type="checkbox"/>	After-tax dollars (Roth) means taxes are paid on contributions in the year made, but withdrawals from plan are tax free during retirement. Maximum contribution between a 403(b) and 457(b) plan is \$46,000.00, excluding catch-up contribution.

Fund available:

Wisconsin Deferred Compensation Plan Account#: _____ Pretax Amount per Payroll _____

Wisconsin Deferred Compensation Plan Account#: _____ Roth Amount per Payroll _____

If you've had a 457(b) plan in the past, a special enrollment process must be completed. Please call (877) 457-9327 for more information or to set up a new account. 457(b) plans are typically more flexible than 403(b) plans. There are additional catch-up contributions available. Please consult tax advisor or fund directly for more information.

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- Contributions can be changed throughout the year by completing a new form
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