

# 403(b) SERVICE BASED CATCH-UP REQUEST FORM

For use with 403(b) Deferred Compensation Plan Only, Not for use with 457(b) Plans

- Please supply the information requested below.
- Read all agreements on this form before submitting.
- Fields having an asterisk notation are required.

**IMPORTANT NOTICE: Before You Sign, Read All Information on this form:**

Your employer's 403(b) plan permits eligible participants to utilize the Service Based Catch-Up provision. This catch-up permits employees with 15 or more years of service to contribute up to an additional \$3,000 beyond their base limit, allowing individuals over age 50 to contribute \$33,000 in 2023 (\$25,500 for employees under age 50.) In addition, a 403(b) participant must have contributed less than an average of \$5,000/year over the course of their employment. By submitting the form below, you request that TDS determine your eligibility to utilize the Service Based Catch-Up.

## Employer Information

\* Employer Name, City and State:

\* Date of Hire:

## Participant Information

\* Social Security Number: \* First Name: MI: \* Last Name:

   

\*Maiden/Former Name: \* Date of Birth:

 

\*Phone: \*Email address:

 

## Employee Signature (Mandatory)

By signing below, I hereby request that TDS calculate my eligibility for the Service Based Catch-Up, and update my Maximum Allowable Contribution (MAC) based upon the outcome of such calculation(s). I understand that TDS will monitor my MAC on an ongoing basis, and that I will retain the opportunity to utilize the Service Based Catch-Up until such a time as my eligibility has been exhausted.

Employee Signature:  Date:

Please return this form to Tax Deferred Solutions, unless otherwise advised by your employer.

Tax Deferred Solutions  
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Citrus Heights, CA 95610

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