

YALE UNIVERSITY RETIREMENT ACCOUNT PLAN (YURAP)
ELECTION/CHANGE FORM

(New Enrollees must also complete a TIAA-CREF or Vanguard Application)

Name: _____
LAST FIRST M. I.

Employee ID Number: _____ Date of birth: ____/____/____
Month Day Year

Title: _____ Department: _____

Employee Participation Election: (select all that apply)

University Core Contribution

I elect to have the University Core contribution invested with (circle one option) TIAA-CREF or Vanguard.

Employee Contribution and University Match

I elect to contribute _____% per pay period and receive a 100% University match on my contributions up to the maximum of 5%.

I elect to contribute the IRS maximum allowable for this current calendar year and subsequent years. This includes any contributions made in this calendar year to a previous employer's plan. I have contributed \$ _____ into a 403(b)/401(k) plan this year through another employer.

I elect to contribute the catch-up amount for participants who are 50 years of age or older during this current calendar year and subsequent years.

I elect to have my contribution and the University Match invested with (circle one option) TIAA-CREF or Vanguard.

This Agreement, which is effective with respect to amounts earned on or after the first day of _____, shall be legally binding to each of the parties with respect to amounts earned while employment continues; provided, however, that either party may terminate this agreement as of the end of any month so that it will not apply to salary subsequently earned by giving advance written notice to the Yale University Benefits Office or to the participant, whichever is applicable.

PARTICIPANT: _____
Signature Date

*All forms must be submitted to the Employee Service Center by the 10th of the month to be processed for the current month.

Employee Service Center Fax Number: (203) 432-5153

