

Notice Regarding Your Eligibility to Participate in Southeastern's 403(b) Plan

Did you know that Southeastern offers several Tax-Deferred 403(b) and after-tax Roth 403(b) plans for employees?

You have the opportunity to save for retirement by participating in one or more of these 403(b) plans through payroll deduction. You can participate in Southeastern's 403(b) plans by making Tax-Deferred 403(b) contributions and/or after-tax Roth 403(b) contributions to one or more of the 403(b) plans offered.

What do I have to do to contribute to one of the 403(b) or Roth 403(b) plans sponsored by Southeastern?

You can contribute to one of the 403(b) plans once you have completed the steps below –

1. Completed an authorization form for Human Resources to provide your demographic data to planwithease.com, the university's Third Part Administrator (TPA) for the 403(b) plan
2. Enrolled with one of the university's approved investment providers
3. Created a logon and password for planwithease.com
4. Selected your vendor in planwithease.com
5. Entered the amount of your salary reduction in planwithease.com
6. Completed a salary reduction agreement (SRA) and returned it to the Benefits Section of the Human Resources Office

The completed SRA gives Southeastern the right to take the elected dollar amount from your paycheck and contribute those amounts to your 403(b) plan. For a complete list of investment providers available to you through the plan and their contact information, please visit www.selu.edu/HRO and click on the [Benefits](#) link, the [Retirement](#) Link and then click on [403B Supplemental Retirement Plans](#).

How do I know if I am eligible to participate in my school's 403(b) plan?

All employees are eligible to participate in the 403(b) plans.

How much can I contribute?

In general, you may contribute up to \$18,000 in 2015. This amount may be adjusted annually. Also, if you have at least 15 years of service with Southeastern or you are at least 50 years old, you may be able to make additional catch-up contributions. Contact the Human Resources Office at 985-549-2057 for additional information on the amount that you can contribute to a 403(b) plan.

I am already participating in the 403(b) plan. What other rules about participating should I know?

If you are already contributing to one of the approved 403(b) plans, you may change your contribution amount by completing Steps 5 and 6 above. If you are increasing your salary reduction amount to request to use the catch-up contribution options, you must have a calculation performed to ensure that you're within the limits to contribute. Your "Total Maximum Exclusion Allowance" calculation may be obtained by contacting your 403(b) plan provider or contacting the Human Resources Office for assistance. Please refer to www.selu.edu/HRO Benefits link for specific plan rules regarding how frequently you are allowed to change your contribution amount.

I have been advised of my opportunity to join the 403b plan(s) through payroll deduction.

Employee Signature

Date

Printed Name

EMPLID