

2016 Verification of Pre-Tax Retirement Withholding With Other Employers

In order to take full advantage of the traditional pre-tax 403(b) and/or the Roth post-tax 403(b) limits, I hereby verify the following:

1. I do not have monies taken from my salary for the pre-tax 403(b) and/or the post-tax 403(b) (Roth), or any other pre-tax dollars, at another employer for their retirement plan.

Name (Printed)

Date

Signature

Social Security No. or Personnel ID No.

OR

2. I do have monies taken from my salary for the pre-tax 403(b) and/or the post-tax Roth 403(b), or other pre-tax dollars, at another employer for their retirement plan. The total amount projected to be taken for the 2016 calendar year is \$_____. I understand this amount must be subtracted from the maximum of both pre-tax 403(b) and post-tax Roth 403(b) contributions allowed by the IRS. The name of the other employer is _____.

Name (Printed)

Date

Signature

Social Security No. or Personnel ID No.