



2024
403(b) Retirement
Catch-Up Option Request

Empl ID: _____

Please return completed form via email to Human Resources at: hrinfo@uvm.edu through the UVM Secure File Transfer Service.

1. Employee Section

Form with fields: Last Name, First Name, Date of Birth (MM/DD/YYYY), Date of Hire (MM/DD/YYYY)

This form MUST be submitted annually in order to increase contribution limit above the IRS maximum of \$23,000 (plan year 2024.)

2. Catch-Up Option - choose ONLY 1 (Limit of one election per calendar year)

Form with three radio button options for catch-up elections: Age 50+, Special Section 402(g), and BOTH.

3. Election Date

I get paid: [] Semi-Monthly [] Bi-Weekly

Payroll Date to begin my catch-up request (MM/DD/YYYY): _____ (see payroll schedule and benefit form deadlines) Found on the UVM Benefits website

Employee Signature

Date

For Human Resources Use Only
This employee has requested and is eligible to contribute a total of:
\$ _____
UVM Benefit Advisor Signature Date

For Human Resources Use Only
HR Info Team Verification
Initials: _____
Date: _____
PS Entry
Initials: _____
Date: _____