

NC Plans One-Time Contribution Form

ONLY use this form if you have **already established** an account in the NC 401(k) Plan, NC 457 Plan or NC 403b Plan administered by Prudential Retirement. If you are unsure whether you have one of these accounts, please call the NC Plans Service Center at 1-866-627-5267 and press option 2 to inquire.

The purpose of this form is to make a special contribution to one or more of these accounts. Often, this occurs when employees are retiring and wish to defer the payout of unused annual leave, etc. instead of receiving payment of those funds in their final check. By contributing those funds on a before-tax basis to an employer-sponsored retirement plan, employees can reduce their taxable income for the current tax year and ease the impact of the increased withholding tax on a final payout.

If you do not already have an NC 401(k), NC 457 or NC 403b account established, please complete an enrollment form. Enrollment forms are available on the UCPS website under the Finance page or through the Plans' website at www.NCPlans.prudential.com.

*Our local NC Plans representative is Jodie Musselwhite if you have questions about the Plans or your account. She can be reached at **Jodie.Musselwhite@Prudential.com** or by calling **(704)219-9432**.*



Dale R. Folwell, CPA
DALE R. FOLWELL, CPA

One Time Contribution Form

NORTH CAROLINA SUPPLEMENTAL RETIREMENT PLANS

Instructions

This form may be used to defer additional compensation or other amounts paid out on a one-time basis, such as longevity payment or final payments for vacation and/or bonus leave upon separating from service. The deduction will occur only once and then it will revert back to the previous amount being deducted (if any). Please print in black ink and keep a copy for your records. **Send the completed form to your payroll office** in sufficient time for them to enter the change for the appropriate pay period. **State employees on the BEACON payroll system should follow the special instructions at the bottom of this form.** If you have not already completed an enrollment form to establish this account, please contact your local Retirement Education Manager or your Human Resources department to enroll prior to submitting this form. Enrollment forms are also available online at www.ncplans.prudential.com.

About You

Employer name: _____

Social Security number

Daytime telephone number

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|

area code

First name

MI

Last name

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|

Questions?
Call 1-866-627-5267
for assistance.

One Time Contribution

I wish to contribute the following from my salary for payroll date _____

If this is related to a *retirement/separation of service* payout, please provide the effective date of *retirement/separation* _____

NC 401(k) Plan (002003) - please provide whole dollar or percentage amounts

Contribute on a **Before-Tax** basis \$ _____, _____ .00 or _____ % to NC 401(k) Plan.

Contribute on a **Roth** basis \$ _____, _____ .00 or _____ % to NC 401(k) Plan.

NC 457 Deferred Compensation Plan (012003) - please provide whole dollar or percentage amounts

Contribute on a **Before-Tax** basis \$ _____, _____ .00 or _____ % to NC 457 Deferred Compensation Plan.

Contribute on a **Roth** basis \$ _____, _____ .00 or _____ % to NC 457 Deferred Compensation Plan.

NC 403(b) Plan (022003) - please provide whole dollar or percentage amounts

Contribute on a **Before-Tax** basis \$ _____, _____ .00 or _____ % to NC 403(b) Plan.

Contribute on a **Roth** basis \$ _____, _____ .00 or _____ % to NC 403(b) Plan.

If you are not certain of your method (\$ or %) of your employee deferrals, please verify with your Payroll Office.

Please note: This contribution change will be effective for the payroll date specified above ONLY. Your current rate, if any, will resume with your next payroll cycle.

The amounts contributed through this form are subject to the annual IRS 402g limits.

Your Authorization

I understand the timing of this one time contribution needs to be coordinated through my payroll office in order to have the amount above deducted from the proper paycheck.

X _____ Date _____
Participant's signature

Employees on BEACON PAYROLL: Please return completed form to BEST Shared Service
1425 Mail Service Center, Raleigh, NC 27699-1425 or fax it directly to 919.855.6861.

****Please be sure that deferrals are in WHOLE DOLLARS ONLY****

(If you are not certain your payroll is through BEACON, please contact your Payroll Office.)