

## CITY OF PORTLAND Enrollment and Contribution Election Form

Use this form to establish your account and /or make contributions elections for your CITY OF PORTLAND 457 Deferred Compensation Plan at MissionSquare Retirement.

I want to:       Enroll / Start My Contributions       Change My Contributions

### PERSONAL INFORMATION

|   |                           |  |
|---|---------------------------|--|
| EMPLOYER PLAN NAME:<br><b>CITY OF PORTLAND 300592</b> |                           |  |
| SOCIAL SECURITY NUMBER: FOR TAX REPORTING PURPOSES    | DATE OF BIRTH: MM/DD/YYYY | GENDER:<br><input type="checkbox"/> FEMALE <input type="checkbox"/> MALE <input type="checkbox"/> OTHER  |
| FULL NAME: LAST, FIRST, MI                            |                           | MARITAL STATUS:<br><input type="checkbox"/> MARRIED <input type="checkbox"/> SINGLE <input type="checkbox"/> WIDOWED <input type="checkbox"/> DIVORCED |
| MAILING ADDRESS:                                      |                           |  |
| STREET  | CITY                      | STATE      ZIP   |
| MOBILE PHONE NUMBER:                                  | EMAIL ADDRESS:            | DATE OF HIRE: MM/DD/YYYY   |

### CONTRIBUTION AMOUNT

I authorize my employer to contribute the amount specified below from my pay each pay period. Your contributions will be maintained based upon the information entered in this form. Contributions will begin as soon as administratively feasible under your plan.

Pre-tax contributions of \_\_\_\_\_% **OR** \$\_\_\_\_\_ from my pay each pay period.

Roth contributions of \_\_\_\_\_% **OR** \$\_\_\_\_\_ from my pay each pay period.

**Normal Contribution Limit (2024):** 100% of compensation or \$23,000, whichever is less

Consider Ways to Save More:

- Age 50 catch-up contributions (up to \$7,500 more than the normal limit. \$30,500 maximum)
- 457 Pre-Retirement Catch-up –**SEE PRE-RETIREMENT CONTRIBUTION CATCH-UP FORM**

### SIGNATURE

By submitting this form, you understand you are authorizing your plan sponsor to enroll you and/or update your contributions in CITY OF PORTLAND 457 Deferred Compensation Plan Plan at MissionSquare Retirement.

Note that upon enrollment your entire account is invested in the Plan’s default investment selection until you select your investment allocations. To see information on the default fund for CITY OF PORTLAND 457 Deferred Compensation Plan 300592 as well as performance and fees of available investment options go to [www.missionsq.org/enroll](http://www.missionsq.org/enroll)

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**SUBMIT THE COMPLETED FORM TO YOUR EMPLOYER. RETAIN A COPY FOR YOUR RECORDS**