

# Maximum Allowable Contribution Worksheet

## 403(b) 2009



<b>Instructions</b>	<p>The 2009 Maximum Allowable Contribution Worksheet is to be used to determine the maximum dollar amount that you may contribute to a 403(b) Retirement Program in 2009. Upon completion, submit a copy of this form to National Benefit Services, LLC by fax or mail.</p> <p><b>NBS Mailing Address:</b> National Benefit Services, LLC 8523 S. Redwood Road West Jordan, UT 84088</p> <p><b>NBS Fax Number:</b> (800) 597-8206</p> <p><b>NBS Phone Number:</b> (800) 274-0503 ext. 5</p>	
<b>Employee Information</b>	Participant Name	Social Security Number
	Employer Name	Home Phone Number
	Participant Mailing Address	Work Phone Number
	(Street)  (City, ST ZIP)	E-mail Address
<b>403(b) and Roth 403(b) Calculation</b>	<p>1. 2009 base deferral limit <span style="float: right;">1. <input type="text" value="\$16,500.00"/></span></p> <p>2. Special 15-Year Catch-up Contribution (if permitted by your employer)</p> <p>a. Have you completed 15 or more full years of service with you current employer? If NO, enter \$0 in line 2e and proceed to question 3. If YES, continue to the next question. <span style="float: right;">2a. YES / NO</span></p> <p>b. Have your previous combined 403(b) and Roth 403(b) contributions averaged less than \$5,000 per year during your lifetime? If NO, enter \$0 in line 2e and proceed to question 3. If YES, continue to the next question. <span style="float: right;">2b. YES / NO</span></p> <p>c. Have you made any Special 15-Year Catch-up contributions previously? If NO, skip to question 2e. If YES, continue to next question. <span style="float: right;">2c. YES / NO</span></p> <p>d. Enter the total amount of any previously utilized Special 15-Year Catch-up contributions in line 2d. <span style="float: right;">2d. <input type="text"/></span></p> <p>e. Subtract line 2d from \$15,000. If the result is greater than \$3,000 then enter \$3,000 in line 2e. If the result is less than \$3,000 then enter the result in line 2e. <span style="float: right;">2e. <input type="text"/></span></p> <p>3. Age 50 Catch-up Contribution</p> <p>a. Will you reach Age 50 by 12/31/2009? <span style="float: right;">3a. YES / NO</span></p> <p>b. If 3a is YES, enter \$5,500 in line 3b. If 3a is NO, enter \$0 in line 3b. <span style="float: right;">3b. <input type="text"/></span></p> <p>4. Add lines 1, 2e, and 3b. <b>This is your Maximum 403(b) and Roth 403(b) Contribution Amount for 2009. This number cannot exceed \$25,000.</b> <span style="float: right;">4. <input type="text"/></span></p> <p>5. Enter the total of any contributions already made to 403(b) plans during 2009. <span style="float: right;">5. <input type="text"/></span></p> <p>6. Subtract line 5 from line 4. This is the total remaining amount you may contribute to 403(b) plans during 2009. <span style="float: right;">6. <input type="text"/></span></p>	
<b>Employee Signature</b>	<p><b>IMPORTANT:</b> You may rely on the accuracy of this Worksheet if the information you provide is correct and complete. Neither your Employer, nor National Benefit Services, LLC possess data for purposes of calculating the 403(b) Special 15-Year Catch-up Contribution. By signing this Worksheet, you certify that all the information provided is accurate and you agree to indemnify and hold harmless your Employer, and National Benefit Services, LLC from any and all damages which may result from providing inaccurate or incomplete information. You understand and agree that your total annual contributions to the combined 403(b) and Roth 403(b).</p> <p>Employee Signature <span style="float: right;">Date</span></p> <p><b>X</b></p>	