



Personal Data

Name (please print): _____

REQUIRED Account Number OR Last 4 of SSN: _____ Date of Birth: _____

Street Address: _____

City: _____ State: _____ ZIP: _____

Phone: _____ Employer Name: _____

Age-Based Catch-up Provision

The Age-Based Catch-Up provision allows participants who are age 50 and over to make additional contributions to the Plan. Participants are eligible to join this Catch-up program at any time during or after the year they turn age 50. If you are between the ages of 50-59, you can contribute an additional \$7,500 through the Age-Based Catch-Up in 2025. If you will be aged 60-63 during 2025, you are eligible for an additional \$3,750 for a total of \$11,250. These age-based catch-up amounts are in addition to the 2025 regular maximum deferral of \$23,500 for a total of \$31,000 (standard) or \$34,750 (Aged 60-63). The Catch-Up limit returns to \$7,500 for participants aged 64 and older in 2025. All Catch-Up limits are subject to change annually by the IRS.

Deferral Information

Select and complete ONLY ONE deferral option below:

Please keep my current deferral (% or \$) on file. Prior to submitting this form have you? 1.) Confirmed your current deferral amount on www.nysdcp.com or by contacting the HELPLINE? 2.) Read the "Important Information" section below to determine if any other action is needed?

Update to a New Deferral. Please change my current deferral (% or \$) as indicated directly below. Please read the "Important Information" section below to ensure accuracy and to avoid potential delays with your request.

New Pre-Tax Deferral _____% OR \$ _____ (Select One, Whole percentage or dollar amount)

New Roth Deferral _____% OR \$ _____ (Select One, Whole percentage or dollar amount)**

** If you select both pretax and Roth please make sure the combined total does not exceed 100%.

Important Information:

If you are paid by the Office of the State Comptroller (OSC): 1.) Please indicate the 5-digit Agency code located on the upper left-hand side of your most recent paystub here: _____ 2.) Deferrals must be in a percentage 3.) Pre-tax and Roth contributions are allowed.

If you are NOT paid through OSC: 1.) Your employer may use a third-party administrator such as OMNI who may require additional information from you related to this request. Only your payroll department would know if they utilize a third-party administrator and what they may require. 2.) If you are not certain if your employer accepts a percentage or dollar deferral or whether they accept Roth contributions you can contact either your employer's payroll Department or the HELPLINE.

Disclosures and Authorization

I have read the entire form and understand the provisions it outlines. I also authorize my total maximum of deferrals for the current year and any subsequent years to be equal to the maximum regular deferral plus the applicable Age-Based Catch-up I am eligible for. I understand that participation in the Age-Based Catch-up is renewed automatically annually, however, any potential deferral adjustments are not automatically updated by the Plan, and I may need to adjust my deferral amount accordingly. In addition, I understand that if I am on the Age-Based Catch-up, I will automatically qualify for the additional catch-up amount between the ages of 60-63.

This provision cannot be used concurrently with the Retirement Catch-up Provision. Unlike the Retirement Catch-up provision, the ability to make Age-Based Catch-up contributions is not determined by a participant's prior underutilizations of contribution or their eligible retirement year.

I authorize my employer to deduct the deferral amount or deferral percentage set forth above each pay period for the purposes of contributing it to my Plan account. This agreement will continue until further notice by me.

Signature: _____ Date: _____

Form Return

Mail: New York State Deferred Compensation Plan
Administrative Service Agency
PO Box 182797
Columbus, OH 43218-2797

Fax: 1-877-677-4329

Overnight Mail: New York State Deferred Compensation Plan
Administrative Service Agency, 1-LC-F2
1 Nationwide Plaza
Columbus, Ohio 43215-2239

When faxing paperwork, please allow two hours for your form to be received. If your fax is sent after 3:00pm your paperwork will be filed on the next business day.