

# Elective Deferral and Vendor Election Instructions

Please enroll in the 403(b) plan maintained by Warren County R-III School District using the Elective Deferral and Vendor Election Form. **New employees must complete all sections.** Current participants need to complete the applicable sections to make changes to their current elective deferral amounts or their vendor(s). The instructions for each section of this form are provided below:

At the top of the form, the eligible Employee/Participant should check one of the options to indicate the reason for completing the form in order to ensure complete processing.

<b>Section A</b>	<p><b>Your Info</b></p> <p>All Employees/Participants completing this form must enter the information requested in this section as indicated so that they will be properly identified as the originator of the election form.</p>
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<b>Section B</b>	<p><b>Your Election</b></p> <p>New Employees must complete this section and indicate the dollar amount they wish to contribute to the plan.</p> <p>Current Participants should complete this section if they wish to change the dollar amount they are currently deferring to the plan.</p> <p>Your deferrals will start once your Employer has had sufficient time to update their payroll system. If you do not see your deferral starting within a reasonable time, please contact your Employer.</p>
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<b>Section C</b>	<p><b>Your Vendor Direction</b></p> <p>The vendors approved to receive current contributions are listed in this section. New Employees enrolling in the plan must complete this section of the form to choose the vendors to which they wish to invest contributions and to indicate the dollar amount that will be allocated to each vendor.</p> <p>Current participants should complete this section if they wish to make changes with whom they are investing their contributions. You must also indicate the account/contract number to which the monies are being allocated with the appropriate vendor. This information should be provided to you by the vendor at the time you opened the account/contract. If you have not established the account/contract, you cannot select the new vendor at this time.</p> <p>Once this information has been provided, CPI will input the election(s) amount along with the vendor(s) you have chosen for such allocations.</p>
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<b>Section D</b>	<p><b>Sign</b></p> <p>New employees and current participants should read this section carefully and sign where indicated in order for their election(s) to take effect.</p>
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<p><b>Mailing Instructions:</b></p> <p>Upon completion of the Elective Deferral and Vendor Election Form, the form should be mailed, faxed, scanned or e-mailed to the following address:</p> <p>Warren County R-III School District Attn: Rhonda Woods 302 Kuhl Ave. Warrenton, MO 63383 Fax: (636) 456-7687 E-mail: <a href="mailto:woodsrr@warrencor3.k12.mo.us">woodsrr@warrencor3.k12.mo.us</a></p> <p>If you need assistance completing this form, you can call Rhonda Woods (636) 456-6901 from 7:30 a.m. to 4:00 p.m. Central Time, Monday through Friday. You can also send and e-mail to <a href="mailto:woodsrr@warrencor3.k12.mo.us">woodsrr@warrencor3.k12.mo.us</a> .</p>
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