

******THIS FORM NOT VALID FOR INSPERITY RETIREMENT PLANS******

Use this form to indicate the deductions you would like taken from your paychecks as contributions/loan payments toward your company's retirement plan where Insperity Retirement Services is **not** the record-keeper (an outside record-keeper).

Instructions for completing this form start on Page 3.

Employee Information

Employee Name	Last 4 Digits of Social Security No.	Insperity Employee ID No. <div style="border: 1px solid black; padding: 2px; text-align: center;">OR</div>
Client Company Name		Client Number

Deductions per Paycheck

Effective Date:

Salary Deferral Election

For each category below (pretax, Roth (after-tax), and voluntary after-tax), indicate the dollar amount (check \$) or the percent (check %) to be deducted from each paycheck for contribution to your company's retirement plan. Note that if you are age 50 or older and want to make catch up contributions, you must separately election to deduct them.

Type of Salary Deferral Election	Check \$ or % (select only one)	Amount or Percentage of Compensation
<input type="checkbox"/> Pretax Election	<input type="checkbox"/> \$ <input type="checkbox"/> %	
<input type="checkbox"/> Pretax Catch-up Election	<input type="checkbox"/> \$ <input type="checkbox"/> %	
<input type="checkbox"/> Roth Election (after tax)	<input type="checkbox"/> \$ <input type="checkbox"/> %	
<input type="checkbox"/> Roth Catch-Up Election (after tax)	<input type="checkbox"/> \$ <input type="checkbox"/> %	
<input type="checkbox"/> Voluntary After-Tax Election (other than Roth)	<input type="checkbox"/> \$ <input type="checkbox"/> %	
Total to be deducted with each paycheck:		

Separate Deferral Election for BONUS Paychecks

If this section is left blank, and your company's plan allows separate elections for bonus paychecks, the above elections will also apply to bonus paychecks. If you do not want deferrals taken from bonus paychecks and your company's plan allows separate elections for bonus paychecks, you must elect \$0 or 0% in this section. Follow the same instructions from above to complete this section.

Type of Separate Deferral Election for BONUS	Check \$ or % (select only one)	Amount or Percentage of Compensation
<input type="checkbox"/> Pretax Election	<input type="checkbox"/> \$ <input type="checkbox"/> %	
<input type="checkbox"/> Pretax Catch-up Election	<input type="checkbox"/> \$ <input type="checkbox"/> %	
<input type="checkbox"/> Roth Election (after tax)	<input type="checkbox"/> \$ <input type="checkbox"/> %	
<input type="checkbox"/> Roth Catch-Up Election (after tax)	<input type="checkbox"/> \$ <input type="checkbox"/> %	
<input type="checkbox"/> Voluntary After-Tax Election (other than Roth)	<input type="checkbox"/> \$ <input type="checkbox"/> %	
Total to be deducted with each bonus paycheck		

Employee Name	Last 4 Digits of Social Security No.	Insperity Employee ID No.
		OR

Retirement Plan Loan Deductions

Enter data for **active retirement plan loans** only. You may not use this form to request paycheck deductions for any other type of loan.

If you have more than three active retirement plan loans, complete an additional Employee Deduction Authorization form, listing the remaining loans, and return it along with this form.

Loan 1

Payment Amount Per Paycheck \$	Requested Start Date	End Date
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Loan 2

Payment Amount Per Paycheck \$	Requested Start Date	End Date
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Loan 3

Payment Amount Per Paycheck \$	Requested Start Date	End Date
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Authorization

I HEREBY AUTHORIZE INSPERITY TO TAKE THE ABOVE DESCRIBED DEDUCTIONS FROM MY PAYCHECKS AND DELIVER THEM TO YOUR COMPANY. Any initial request or change to the deductions authorized will take effect within a reasonable period of time after Insperity's payroll specialist/team receives the completed Employee Deduction Authorization form.

Insperity assumes no responsibility for ensuring that the above authorized paycheck deductions are in compliance with the provisions or practices of your company's plan, the Internal Revenue Code or applicable Treasury Regulations. Insperity also assumes no responsibility for the deposit of amounts deducted from your paychecks into the trust account(s) associated with your company's plan; deposits are solely the responsibility of your company and the plan administrator of the plan.

Your plan administrator and company are solely responsible for administration of the plan for which these deductions are made, including but not limited to correctly reporting to Insperity the deduction elections you have made, funding any deferral, matching or other contributions, confirming that the deduction amount made on each of your paychecks is correct, and administering the funds contributed to the plan.

Sign And Date The Form

Employee Name (Printed)	Last 4 Digits of Social Security No.	Insperity Employee ID No.
		OR
Employee Signature		Date Signed (mm/dd/yyyy)

ADDITIONAL INSTRUCTIONS FOR COMPLETING OUTSIDE RECORD-KEEPER (ORK)
 EMPLOYEE DEDUCTION AUTHORIZATION FORM

Salary Deferral Election Instructions

- Total the dollar amount or percentage of the deductions. The total you have indicated will be deducted from each paycheck that includes eligible compensation under your company's plan (even if you receive multiple paychecks during a single pay period), until the applicable limit is met, including the catch-up limit if you are age 50 or older. Example: If you elect 10% pretax, 10% pretax catch-up and 10% Roth, a total of 30% will be deducted from each paycheck.

Separate Deferral Election for BONUS Paychecks Instructions

- If your company's plan includes bonus paychecks for purposes of plan benefits, the salary deferral elections will apply to bonus paychecks as well as regular paychecks, unless your plan allows separate elections for bonus paychecks **and** you make a separate election for bonus paychecks.

Retirement Plan Loan Deduction Instructions

- For each loan, enter the dollar amount to be deducted from the regular paycheck in each pay period toward the repayment of the loan. The "requested start date" is the pay date when payments on the loan are supposed to begin, and the "end date" is the pay date when payments on the loan are supposed to end. You are responsible to make sure the amount and dates are in accordance with your loan's amortization schedule; Insperity is not responsible for any default of your loan. Your retirement plan loan deductions will be applied only to regular paychecks.
- **Note:** If Insperity does not receive the completed form within a reasonable period of time prior to the requested start date for the loan payments, retirement plan loan deductions for the initial loan payments may be missed, and you may be responsible for making those payments directly to your company's plan. Check with your company's authorized representative regarding missed loan payments. Regardless of when retirement plan loan deductions begin, they will terminate on the indicated end date. If no end date is indicated, payments will continue indefinitely. A new form is required to submit a new end date or change the current end date.

Additional Instructions

- This form is not your company's plan enrollment or election change form. Check with your company's authorized representative regarding the method for enrolling or making election changes in your plan. This form authorizes Insperity to take payroll deductions and must represent the same elections as are on file with your plan administrator.
- Complete this form **ONLY** if your company sponsors a retirement plan where Insperity Retirement Services is **not** the record-keeper. If your company sponsors a plan serviced by Insperity Retirement Services, you can enroll or change current elections via Insperity Premier™ at portal.insperity.com, then accessing the Retirement Service CenterSM.

Instructions continued on next page.

ADDITIONAL INSTRUCTIONS FOR COMPLETING OUTSIDE RECORD-KEEPER (ORK)
EMPLOYEE DEDUCTION AUTHORIZATION FORM

Additional Instructions (continued)

- Submit the completed Employee Deduction Authorization form to the authorized representative at your company. Your company should forward the completed form to Insperity. Your deductions will take effect within a reasonable period of time after Insperity's payroll specialist/team receives the completed form, generally within one to two pay periods. A new form is required whenever you change your deductions (contributions or loans).
- **Prior to completing the form**, please contact an authorized representative of your company to determine the specific features of your company's plan, including:
 - Whether you have met the eligibility requirements to participate in the plan.
 - Whether you should enroll with a percentage or a dollar amount.
 - Whether the plan has limits on the percentage or dollar amount you may contribute.
 - Whether the plan allows for catch-up contributions (for employees age 50 or older).
 - Whether the plan allows for Roth (after tax) contributions.
 - Whether the plan allows for voluntary after-tax contributions (other than Roth).
 - Whether the plan allows a separate election for bonus paychecks.
 - The amortization schedule of any retirement plan loan(s) you may have received.