2009

Human Resources Benefits Office
200 Boston Avenue • Suite 1600 • Medford, MA 02155 • (617) 627-3270

401(a) Basic Retirement Plan
Authorization for Investment Choices

Personal Information

Please Print

Employee Last Name	First Name	MI	University Employee ID Number	
Street Address			Apartment #	
City	State	Zip Code	Home Phone	Work Telephone

Your election becomes effective on the first of the month following the month we receive your completed forms, unless a future month is indicated here: _____ (mo./yr.).

Future Investment Allocation:

Percentage of Contribution to:	Percentage of Contribution to:	Total Contribution Allocation:
TIAA/CREF (01) **%**	**Fidelity Investments (02)** **%**	**= 100%**

NOTE: If you already have an account set-up through the University with the investment provider you have selected, the next section does not apply to you.

If you are choosing TIAA-CREF or Fidelity Investments for the first time, your contributions will automatically be invested in the default fund; the **Freedom Funds with Fidelity**, and **the Life Cycle Funds** with TIAA-CREF.

The investment company(ies) you select will send you a package outlining all of your investment options and you can re-direct your money at that time. If you have any questions in the meantime, please feel free to contact your investment company using the contact information below.

Fidelity Investments
1-800-343-0860
www.fidelity.com

TIAA –CREF
1-800-842-2776
www.tiaa-cref.org

Employee Signature **Date**

Benefits Office Signature **Date**

For Office Use Only:
SEMI ☐ WEEKLY ☐