



2011

Human Resources Benefits Office
200 Boston Avenue • Suite 1600 • Medford, MA 02155 • (617) 627-3270
Fax: (617) 627-3615

401(a) Basic Retirement Plan
Authorization for Investment Vendor 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 Vendor Allocation:

Table with 3 columns: Percentage of Contribution to: TIAA/CREF (01) %, Percentage of Contribution to: Fidelity Investments (02) %, Total Contribution Allocation: = 100%

If you select TIAA-CREF for all or part of your contribution, you must contact TIAA-CREF to make your future contribution investment election at 1-800-842-2776 or online at www.tiaa-cref.org. Effective April 29, 2011 and thereafter, there will be two investment choices available at TIAA-CREF, the TIAA Traditional Annuity and the CREF Stock fund. Until you complete this second step of selecting investment choices through TIAA-CREF, 100% of your 401(a) contribution will be sent to the Plan default, a Fidelity Lifecycle fund.

If you are choosing Fidelity Investments, your contributions will automatically be invested in the Plan default fund; a Fidelity Lifecycle Fund until you make an investment fund election through the Fidelity at 1-800-343-0860 or online at www.fidelity.com/atwork.

The investment company(ies) you select will send you a package outlining all of your investment options.

Employees are 100% vested in the 401(a) Basic Retirement Plan once they have completed three (3) years of eligible service.

Employee Signature Date

Benefits Office Signature Date

For Office Use Only:
SEMI [] WEEKLY []