

# 457(b) Employer Contribution Questionnaire

**Employer Name:** \_\_\_\_\_ **State** \_\_\_\_\_

Employer hereby makes available to its employees a 457(b) Plan that provides for employer contributions in accordance with applicable employment agreements and/or collective bargaining agreements, and agrees that the following provisions shall govern all employer contributions and any earnings attributable to the employer contributions made to the Plan.

## A. Type of Employer Contributions

- Discretionary Employer Contributions
  - Fixed Employer Contributions
  - Matching Employer Contributions (If matching contributions are made, please provide the formula)
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## B. Vesting Schedule (if applicable)

- A Participant shall become 100% vested in his or her account immediately.
- Graded Vesting (i.e. Year 1 – 20%, Year 2 – 40%, Year 3 – 60%, Year 4 – 80%, Year 5 – 100%)

Schedule: \_\_\_\_\_

- Cliff Vesting (i.e. Year 1 – 0%, Year 2 – 0%, Year 3 – 100%)

Schedule: \_\_\_\_\_

- Other – Please attach vesting schedule.

## B. Investment Options

- Any Annuity Contract and/or Custodial Accounts provided by any of the approved Investment Providers in Appendix I.
- Other (*Specify*) \_\_\_\_\_

## C. Eligibility Requirements

- All employees shall be eligible to participate in the Plan for purposes of Employer, Non-Elective Contributions
- Other (Define) \_\_\_\_\_

## D. Age Requirement

- No age requirement for eligibility.
- Participant is eligible after attaining age \_\_\_\_\_.

## E. Years of Eligibility Requirements

- No minimum years of service required.
- Participant is eligible after completing \_\_\_\_\_ year(s) of eligible service.

## F. Entry Dates

- The entry date for participation is anytime during the plan year.
- The entry date for participation shall be \_\_\_\_\_

## G. Loans

- Loans *will* be available under the Plan subject to availability and any additional conditions that may apply under a Participant's 403(b) Individual Agreement(s).
- Loans *will not* be available under the Plan.

## H. Distribution Restrictions

- Severance from employment.
- Death
- Attainment of age \_\_\_\_\_. (*Must be at least 70 ½*)
- Completion of \_\_\_\_\_ years of service.  
Unforeseeable Emergency

## I. Additional information

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Completed by:** \_\_\_\_\_ **Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_