



Utah Retirement Systems
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Contribution and Investment Change Agreement

- INSTRUCTIONS:**
1. Use this form to change your Utah Retirement Systems (URS) 401(k) or 457(b) Plan personal contributions and/or investment options. You can also make changes to your personal contributions and investment options online at www.urs.org.
 2. Please type or print clearly using black ink and review both sides of this form before completing.
 3. If you fax this form, do not mail the original.

SECTION A » PARTICIPANT INFORMATION	
Name (First, Middle, Last)	Social Security # or Account #

SECTION B » PLAN SELECTION I authorize the changes below for the following plan which I participate (check only one):	
Check Only One <input type="checkbox"/> 401(k) Plan Or <input type="checkbox"/> 457(b) Plan	
Important: You may only choose one plan per <i>Contribution and Investment Change Agreement</i> , if you wish to make changes in both the 401(k) and 457(b) Plan, you must submit a separate form for each plan.	
Please Note: Changes to personal contributions in the 457(b) Plan cannot begin until the calendar month following the date a <i>Contribution and Investment Change Agreement</i> is received in good order by URS. Personal contributions can be cancelled at any time.	

SECTION C » PERSONAL CONTRIBUTION For the plan selected above I authorize the following personal contribution from my salary:	
Name of employer this personal contribution will apply to: _____.	
<input type="checkbox"/> Total amount to be withheld per pay period \$ _____ or _____% beginning the next possible pay period.	
<input type="checkbox"/> I am leaving employment and wish to have \$ _____ contributed from my final paycheck. Date of final paycheck _____.	
<input type="checkbox"/> Cancel personal contributions from my salary.	
<input type="checkbox"/> No Change.	

SECTION D » INVESTMENT ALLOCATIONS I am authorizing the following investment allocation percentages for the plan selected above:	
<input type="checkbox"/> No Change	
1. Apply my investment allocation percentages to (check only one):	
<input type="checkbox"/> Current Balances AND Future Allocations	
<input type="checkbox"/> Future Allocations ONLY	
<input type="checkbox"/> Current Balances ONLY	
Important: If more than one box is checked the form will be returned to you because it is invalid. If no box is checked the investment allocation elected below will be applied to both Current Balances and Future Allocations.	
2. Select the investment allocation to be applied to your vested account (check only one):	
<input type="checkbox"/> I elect to place 100% of my investment allocation in the suggested Target Date Fund based on my date of birth (see chart on reverse).	
<input type="checkbox"/> I elect the following mix of investment options:	
Target Date _____ %	Large Cap Index _____%
Income _____ %	Large Cap Growth _____ %
Bond _____ %	International _____ %
Balanced _____ %	Small Cap _____ %
Large Cap Value _____ %	
Important: The total of the percentage(s) must equal 100%. If the total does not equal 100%, the form will be returned to you.	

SECTION E » PARTICIPANT AUTHORIZATION	
By signing and submitting this Contribution and Investment Change Agreement for processing I am authorizing changes to my personal contributions from my salary and/or investment options and elections established under the Plan as specified on this form.	
Signature	Date