



SEND OR EMAIL COMPLETED FORM TO:

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ASRS 457(b) Supplemental Savings Plan EZ Enrollment Form

PERSONAL INFORMATION (please print)

Name, Social Security Number, Address, City, State, Zip, Home Phone, Work Phone, Email Address, Date of Birth, Employer Name, Primary Beneficiary Name, DOB, Relationship, Percentage

Participant Signature

Date

ENROLLMENT INSTRUCTIONS

I want to enroll in the Program today and begin contributing:

457(b) pretax

\$ per pay (minimum \$10) or % per paycheck (minimum 1%)

457(b) Roth

\$ per pay (minimum \$10) or % per paycheck (minimum 1%)

Please note that this option is currently not available for university employees.

I would like to sign up for the Annual Auto Increase, which will increase my contributions every year by:

\$ OR %

If opting for the Annual Auto Increase, your selection format (i.e., dollar amount or percentage) must be the same as your enrollment format above.

I acknowledge that I have read the terms and conditions detailed below.

Your payroll deduction amount will be invested in the American Funds Target Date Retirement Fund closest to the year in which you turn age 65. Your enrollment will be reflected as early as administratively practicable following your completed request, and you will receive a welcome notice upon receipt of this form. Changes can be made at any time, subject to timing restrictions.

TERMS AND CONDITIONS

Upon receipt of this enrollment form, you will be provided a welcome kit, which will include a Beneficiary Form, Memorandum of Understanding and Enrollment Kit or Basics Booklet with more detailed information on the provisions outlined below:

- My account balance will be held in trust for the exclusive benefit of me or my beneficiaries.
Based on market fluctuations, the rate of return on my account could be either positive or negative. This could result in my account balance being worth less than my contributions.
Investments may have underlying expenses or management fees that will reduce the investment results. Information on these expenses can be found in the investment profiles or the respective prospectus(es). Investment profiles and prospectus(es) can be found on the Plan's website at azssdp.com.
Fund prospectuses can be obtained by calling 855-297-8228. Read the prospectuses carefully before investing. Before investing, carefully consider the fund's investment objectives, risks, charges and expenses. The fund prospectus contains this and other important information.

- In the event beneficiary information is not provided or is incomplete, the beneficiary will be the participant's estate.

The Internal Revenue Code and/or the Plan imposes rules which limit the times when I can make changes or receive withdrawals from the Program.

- Subject to timing restrictions, I may change my contribution amount and at any time modify the investment allocation of my current account balance.
I may withdraw funds from the Program only upon:
1) Death, disability or severance from employment
2) An unforeseeable emergency (as defined by IRC section 457(b))
Participant loans are available, subject to the Plan's loan procedures.
Although not required, withdrawals may begin after receipt of a Payout Request Form that includes my severance from employment date and my employer's verification of severance.
The funds in my account may be eligible for rollover to an IRA or to an eligible retirement plan upon severance from employment.



**Nationwide**

*Arizona State Retirement System 457(b) Supplemental Savings Plan was created specifically for you!*

## WHAT IS A 457(b)?

The Arizona State Retirement System offers supplemental retirement plans for employees like you to set aside money from each paycheck toward retirement. These plans offer a tax-advantage way to invest and can help bridge the gap between what you have in your pension and Social Security, and how much you'll need in retirement. You may choose to make pre-tax, Roth after-tax, or both types of contributions to the 457(b) plan.

## WHY SHOULD I PARTICIPATE?

The Arizona State Retirement System (Arizona State Retirement System Supplemental Salary Deferral Plan) help put you in control of when, where and how much you invest. And that's just the beginning — here are four more reasons why it's smart to participate in your deferred compensation plan:

- **You can start anytime** — Your deferred compensation plans will work for you whether you're approaching retirement or just getting started.

- **Every little bit helps** — Even investing a small amount of money can really add up over time. And if you increase your contributions on a regular basis, the overall impact to your paycheck may not seem too painful.
- **This plan is made for you** — Unlike other retirement plans, a 457(b) deferred compensation plan takes into account that you may retire sooner than workers in the private sector. Generally, you don't have to worry about paying a penalty for retiring early or beginning to take income from the plan before age 59½ (unlike 401(k) plans). Withdrawals are subject to income tax in the year the payments are made.
- **Get personalized guidance** — Get personalized guidance from knowledgeable local Retirement Specialists for every stage of planning for retirement.

## HOW DO I ENROLL?

Complete the EZ Enrollment Form on the reverse side.

## WANT MORE INFORMATION?

 Visit [azssdp.com](https://azssdp.com) to learn more or

 Contact your local Retirement Specialist by Calling **602-266-2733**.

Nationwide Retirement Specialists are Registered Representatives of Nationwide Investment Services Corporation, member FINRA, Columbus, Ohio. Nationwide and its representatives do not give legal or tax advice. An attorney or tax advisor should be consulted for answers to specific questions.

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