New York State
Deferred Compensation Plan
A Plan for Your Future

New York State Deferred Compensation Plan
Qualified Military Service Make-Up

Helpline: 800-422-8463 • nysdcp.com

Personal Data

Name (please print): _____

REQUIRED Account Number **OR** Last 4 of SSN: _____ Date of Birth: _____

Street Address: _____

City: _____ State: _____ ZIP: _____

Primary Phone: _____ Primary Phone Type: ☐ Home ☐ Work ☐ Cell

Employer: _____

State Agency Code/Local Employer/ID Number: _____

I understand the following provisions of the New York State Deferred Compensation Plan:

1. My actual compensation during the 12-month period preceding the qualified military service is used to determine the maximum Qualified Military Make-Up amount.
2. The time limit for making Qualified Military Make-Up deferrals is the lesser of (a) the period of qualified military service times three, or (b) five years.
3. I am responsible for assuring that my deferrals comply with applicable limitations and requirements.
4. Qualified Military Make-Up deferrals may be made in addition to regular deferral amounts and other catch-up deferrals I may be making.

Deferral Overview

Regular Deferrals	$_____ (Not to exceed the current annual limit)
Qualified Military Service Make-Up Deferrals	$_____ (Not to exceed the amount on Step 3, Line 3)
Retirement Catch-Up Deferrals	$_____ (Not to exceed the current annual limit, if eligible)
Age-Based Catch-Up Deferrals (may differ if between ages 60-63)	$_____ (Not to exceed the current annual limit, if eligible)
Total Deferrals in _____ (Year)	$_____

Secure Act 2.0 Section 603. Effective in 2026, if you are aged 50 or older, electing an Age-Based Catch-up and earned more than $150,000 in FICA wages in the prior year, your catch-up contributions MUST be made as Roth (after-tax) contributions.

Authorization

New Pre-Tax Deferral Percentage: _____***% per pay period (Whole percentages only)***

New Roth Deferral Percentage: _____***% per pay period (Whole percentages only)***

If your employer only accepts dollar deferrals, write in an amount per pay period, instead of percentage amount. State employees must use a percentage amount.

If this deferral amount is not available due to other payroll deductions, I understand that deferrals will be taken to the fullest extent possible.

I attest that the information provided on this form is complete and accurate.

Please read the underlying prospectuses carefully. Deferrals made by participants who are not New York State residents may be subject to the state income tax in the year deferred in their state of residence. Please read your state income tax instructions carefully.

Signature: _____ **Date:** _____

Form Return

Mail: New York State Deferred Compensation Plan
Administrative Service Agency
PO Box 182797
Columbus, OH 43218-2797

Overnight Mail: New York State Deferred Compensation Plan
Administrative Service Agency, 1-LC-F2
1 Nationwide Plaza
Columbus, Ohio 43215-2239

Fax: 1-877-677-4329

When faxing paperwork, please allow two hours for your form to be received. If your fax is sent after 3:00 p.m. your paperwork will be filed on the next business day.

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Overview

A participant who is called to active duty in the United States military is eligible to make Qualified Military Make-Up deferrals to the New York State Deferred Compensation Plan in the amount that they could have deferred to their Plan account had their employment with the State or a participating employer not been interrupted by military service. The total amount eligible for Qualified Military Make-Up deferrals is determined for each calendar year during which military service occurred. You may be eligible to make Qualified Military Make-Up deferrals in the calendar year that you return to employment with the State or a participating employer. If you have questions about this form, please contact the HELPLINE at 1-800-422-8463.

Steps to Follow

Step 1: Determine your maximum Qualified Military Make-Up deferral amount by completing **the chart on the following page.**

1. Enter the period of military service separately for each calendar year in Columns 1 and 2.
   - For example, for service between 10/1/2012 and 4/1/2014, enter 10/1/2012 to 12/31/2012 in row 1, 1/1/2013 to 12/31/13 in row 2 and 1/1/2014 to 4/1/2014 in row 3.
2. Count the number of weeks for each calendar year of military service and enter in Column 3.
3. Enter the amount of contributions other than Qualified Military Make-Up deferrals that you have made to a deferred compensation plan during each applicable year of military service, if any, in Column 4. Enter TBD in the year your military service ended if you wish to begin Qualified Military Make-Up deferrals in that year.
4. Enter your Maximum Permissible Contribution for each year in Column 4. This amount is:
   - The maximum regular deferral allowed for that year (see table below),
   - **PLUS** the additional age-based catch-up amounts, if you were at least age 50 or between the ages of 60-63 at the end of the previous year;
   - **OR** your gross salary less Social Security and other pre-tax contributions; whichever amount is less.

Year	Maximum Regular Deferral	Additional Age 50+ Catch-up Amount	Additional Age 60-63 Catch-up Amount
2018	$18,000	$6,000	N/A
2019	$19,500	$6,500	N/A
2020	$19,500	$6,500	N/A
2021	$19,500	$6,500	N/A
2022	$20,500	$6,500	N/A
2023	$22,500	$7,500	N/A
2024	$23,000	$7,500	N/A
2025	$23,500	$7,500	$11,250
2026	$24,500	$8,000	$11,250

5. Subtract the number in Column 4 from the number in Column 5 to determine your Maximum Amount of Qualified Military Make-Up. Enter this amount in Column 6.

   Total Compensation from New York State and/or a participating employer for the 12 months immediately prior to the commencement of your military service:

   $_____

1	2	3	4	5	6
Deployment Date and Location	**Date Military Service Ended**	**Weeks of Military Service**	**Amount Contributed to NYSDCP**	**Maximum Permissible Contributions**	**Maximum Amount of Qualified Military Make-Up**
			$	$	$
			$	$	$
			$	$	$
			$	$	$
Totals			$	$	$

Step 2: Determine the period during which you may make Qualified Military Make-Up deferrals by completing the following formula.

Qualified Military Make-Up deferrals may be made for a period equal to 3 times the period of your military duty, not to exceed 5 years.

- Total weeks of military service 1. _____
- Multiply the number above (Line 1) by 3. 2. (X) 3 = _____
- On Line 3, enter the result from Line 2 or 260, whichever is smaller. 3. _____

You may make Qualified Military Make-Up deferrals for a period of time not to exceed the number of weeks on line 3. For example, if line 3 is 140, you may make Qualified Military Make-Up deferrals for 140 weeks (70 payroll periods if paid bi-weekly).

Step 3. Determine the amount of Qualified Military Make-Up deferrals that you have remaining by completing the following formula.

- Total Maximum Amount of Qualified Military Make-Up 1. $_____
- Amount of Qualified Military Make-Up deferrals used in prior years 2. $_____
- Subtract Line 2 from Line 1 3. $_____

Line 3 is the Maximum Qualified Military Make-Up that may be used.