

PERA *SmartSave*

Deferred Compensation Plan 

SEND OR FAX COMPLETED FORM TO:

Nationwide Retirement Solutions
3600 Rodeo Lane
Suite B1
Santa Fe, NM 87507
Phone: 505-989-4992
Fax: 505-989-4991
NewMexico457dc.com

EZ Enrollment Form: 457(b) Plan

PERSONAL INFORMATION (please print)

Name _____ Male Female

Social Security Number _____

Address _____

City _____ State _____ Zip _____

Home Phone _____ Work Phone _____

Email Address _____

You will be notified via email when your statements and confirmations are available. If you prefer to receive by regular mail, please check the box.

Date of Birth ____/____/____

Employer Information - Where do you work? (Check only one box)

State agency name _____ SHARE ID _____

City (or Village) of _____

County of _____

Beneficiary Name _____

DOB _____ Relationship _____

Participant Signature _____ Date _____

Retirement Specialist Name / Agent Number _____

ENROLLMENT INSTRUCTIONS

I want to enroll in the NM-PERA Deferred Compensation Program today and begin contributing:

\$ _____ per pay period

- Your pre-tax payroll deduction amount will be invested in a LifeCycle fund closest to the year in which you turn 65.
- You will receive a Welcome Letter with your Account Number for you to set-up an on-line account.
- Changes can be made at any time, subject to timing restrictions.

Please be sure to provide your Social Security Number, signature, and date.

Potential impact and balance.

Deferral Per Pay	Paycheck Impact	Annual Deferral	Accumulation 10 Years	Accumulation 20 Years	Accumulation 30 Years
\$25	\$18.75	\$650	\$9,304	\$27,605	\$63,607
\$50	\$37.50	\$1,300	\$18,607	\$55,210	\$127,214
\$75	\$56.25	\$1,950	\$27,911	\$82,815	\$190,821
\$100	\$75.00	\$2,600	\$37,214	\$110,420	\$254,428

This table shows the cumulative value of 26 biweekly deferral amounts over 10, 20, and 30 years, assuming a compound annual rate of 7% and a 25% federal tax rate, for a single person with an annual salary of \$38,000 and one deduction for federal tax purposes. Actual investment returns will vary from year to year, and the value of your account after the specified periods of years shown in the table may be less or more than the amounts shown. This illustration is hypothetical and is not intended to serve as a projection of the investment results of any specific investment. If fees and expenses were reflected, the returns would have been less.



The NM PERA Smart Save Plan is administered by Nationwide.

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