



# State of Arizona Deferred Compensation Plan

SEND OR FAX COMPLETED FORM TO:

Nationwide Retirement Solutions  
4747 N 7th Street Suite 418  
Phoenix, AZ 85014  
Phone: 602-266-2733  
Fax: 602-650-1278  
Or enroll on-line at ArizonaDc.com

## EZ Enrollment Form

### PERSONAL INFORMATION (please print)

Name \_\_\_\_\_  Male  Female

Social Security Number \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

Email Address \_\_\_\_\_

Date of Birth \_\_\_\_\_

Primary Beneficiary Name \_\_\_\_\_

DOB \_\_\_\_\_ Relationship \_\_\_\_\_ Percentage \_\_\_\_\_

Agency \_\_\_\_\_ Agency Code \_\_\_\_\_  
(For NRS use only)

**Paperless Delivery** I am consenting to receive statements, confirmations, terms, agreements and other information provided in connection with my retirement plan electronically.

Email Address \_\_\_\_\_

I wish to participate in an annual automatic contribution increase.

Money Source	Dollar Amount Increase
457(b) Pre-Tax	\$
457(b) Roth	

Increase Contribution Annually on: \_\_\_\_\_(MM/DD)

By checking this box and signing below, I authorize the deferral amount as elected above and I understand that I can modify the amount that I contribute to the plan at any time. I further understand that my initial enrollment or any modification cannot be effective until the first day of the month following the month of the request.

Participant Signature \_\_\_\_\_

Date \_\_\_\_\_

### ENROLLMENT INSTRUCTIONS

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

\$\_\_\_\_\_ per pay (minimum \$10)

Select 1:  457(b) Pre-tax or  457(b) Roth\*

Your payroll deduction amount will be initially invested in the American Funds Target Date Retirement Fund closest to the year in which you turn age 65. I understand that the earliest my enrollment can start is the first day of the month following my completed request, and that upon receipt of this form I will receive a welcome notice. Changes can be made at any time, subject to timing restrictions.

If selected, this increase will automatically occur annually as soon as administratively feasible for the date selected below. Increase can only occur for money source(s) (Pre-Tax and/or Roth) and with \$ or % that you are currently contributing. Please do not select a date of 02/29; if selected, Nationwide will process on 02/28.



# Enroll in the State of Arizona's 457(b) Deferred Compensation Plan

*As an Arizona state public employee, the State of Arizona Deferred Compensation Plans were created specifically for you!*

## WHAT IS 457(b)?

The State of Arizona 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. Available contribution options include:

- **457(b) Traditional Pre-tax**
- **457(b) Roth - after-tax**

## WHY SHOULD I PARTICIPATE?

The State of Arizona Deferred Compensation Plans 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 an additional 10% early withdrawal tax for distributions taken from the plan before age 59½ (unlike 401(k) plans). Withdrawals are taxable income to you 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 [www.ArizonaDC.com](http://www.ArizonaDC.com) to learn more or



contact your local Retirement Specialist by viewing the Rep map or call **602-266-2733**.

Nationwide Retirement Specialists are Registered Representatives of Nationwide Investment Services Corporation, member FINRA. Nationwide representatives cannot offer investment, tax or legal advice. Consult your own counsel before making decisions about participation in the Plan.

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NRW-2199AZ.1 (04/17)