



The Episcopal Diocese of California – Treasurer’s Office  
 1055 Taylor Street, San Francisco, CA 94108  
 tel 415-673-5015; fax 415-673-4863

## 2008 - CLERGY PRE-TAX PAYROLL DEDUCTION AUTHORIZATION - 2008

### FOR RSVP OR OTHER TAX DEFERRED ANNUITY

(THIS PAGE DOES NOT COMPLETE RETIREMENT ACCOUNT ENROLLMENT – THIS AUTHORIZES PAYROLL DEDUCTIONS FOR AN EXISTING RETIREMENT ACCOUNT)

Employee Name: \_\_\_\_\_

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

Employer Name & Location \_\_\_\_\_

		DEDUCTION AMT. PER PAY PERIOD (ANNUAL / 24 PAY PERIODS)
<b>Base contribution:</b>		
Absolute \$ of Contribution. Enter the dollar value of your PER PAY PERIOD contribution (Dollar value <u>will not</u> adjust automatically with payroll changes)		\$ _____*
<b>2008 maximum base contribution is \$15,500*</b>		
Catch-up contributions for those over age 50		\$ _____*
<b>2008 maximum catch-up contribution is \$5,000*</b>		
<b>Note for mid year start date:</b>		
If you wish to reach the annual maximum contributions by 12/31 divide the max. amt. by the number of pay periods remaining for the year. There are 24 pay periods per year (2 per month). Refer to the 2008 payroll calendar for deadlines & remaining pay periods in the year		
<b>The payroll system will automatically stop deductions when annual max. contribution has been reached.</b>		

I confirm that I am enrolled in a Retirement (Pension) Plan, and authorize the Diocese to withhold the amount shown above in Item 2 from my paycheck each pay period. I understand that my contributions withheld by Diocesan payroll will be credited back to my employer and the funds will be forward to my account by my employer.

Employee \_\_\_\_\_ Date \_\_\_\_\_

I confirm that the above clergy person is enrolled in a Retirement (Pension) Plan. The clergy payroll deductions will be credited back to the employer and the employer agrees to forward the clergy contributions to the plan on behalf of the clergy person.

Employer \_\_\_\_\_ Date \_\_\_\_\_

**Send this form to Diocese of California – fax 415-673-4863**