

403(b) Maximum Amount Contributable (MAC)

1. Participant Information—print legibly.

Name _____ Social Security No. _____
Last First Middle

Address _____ Date of Birth _____
City State ZIP

Email _____ Employer/Plan ID _____
 Date Hired in Current District _____

2. Calculation of Annual 402(g) Long Service Catch-Up Option Limit

- A. Years of service with the district. _____
(If you have less than 15 years of service with district, skip to Section 3.)
- B. Calculation for which calendar year-end. _____
(Enter as 12/31/XXXX.)
- C. Maximum amount per year of service. \$5,000
- D. Multiply Line A by Line C. _____
- E. Enter the total amount of all elective deferrals you made for prior years to this district. Include all 403(b) companies.
(Example: You contributed \$2,000 per year for the last 10 years. Enter \$2,000 x 10 years = \$20,000.)
 - \$ _____
- F. Line C minus Line E, if zero or less, enter 0 \$ _____
- G. Maximum increase for long service 402(g) \$15,000
- H. Enter the total of all prior year 402(g) long service catch-up contributions you made after completing 15 years of service in the district.
(Example: Employed 17 years in this district, already contributed to 402(g) long-service catch-up. Enter \$7,000.)
 - \$ _____
- I. Line G minus Line H \$ _____
- J. Maximum additional contributions \$3,000
- K. Enter the lesser of Lines F, I, or J \$ _____
(This is your annual 402(g) long service catch-up limit.)

