



# AGE 50/SPECIAL PRE-RETIREMENT CATCH-UP FORM

1. Use this form to take advantage of the age 50 or special pre-retirement catch-up provision only  
Note: You should only use this form if you have previously established an account in your employer's plan.
2. Return the completed form to your employer. **DO NOT SUBMIT THIS FORM TO MISSIONSQUARE RETIREMENT.**

**FAX:**  
(510) 238-6560

**SUBMIT TO:**  
City of Oakland Benefits Unit  
150 Frank H. Ogawa Plaza, 2nd Floor HR Desk  
Oakland, CA 94612

Year	Age-50 Catch-Up	Pre-Retirement Catch-Up
2022	\$6,500 (\$27,000 total)	\$20,500 (\$41,000 total)

## 1 PARTICIPANT INFORMATION

Employer Plan Number: **307108**                      Employer Plan Name: **City of Oakland**

Employee Number (Required): \_\_\_\_\_

Full Name of Participant: \_\_\_\_\_ Department: \_\_\_\_\_

## 2 CONTRIBUTION AMOUNT & EFFECTIVE DATE

**Catch-up Contributions:** If you are taking advantage of either of the catch-up contribution provisions available to 457 plan participants, please check the applicable box below.

- Age 50 catch-up contributions (up to \$6,500 per year)
- Special pre-retirement catch-up (up to \$20,500 more than the normal limit. \$41,000 maximum.)

Please read MissionSquare's *Pre-Retirement Catch-Up Form* for more information.

### Contribution Amount (per pay period)

I authorize my employer to contribute the amount specified below from my pay each pay period, to be contributed to my 457 deferred compensation plan account with MissionSquare. (Specify a percentage or dollar amount for pre-tax and/or Roth contributions.)

- Pre-Tax Contributions:**     Percentage: \* \_\_\_\_ % or     Dollar Amount: \$ \_\_\_\_\_ (per pay period)
- Roth Contributions:**         Percentage: \* \_\_\_\_ % or     Dollar Amount: \$ \_\_\_\_\_ (per pay period)

Percentage of gross pay cannot be greater than 85%.

### Effective Date

All contribution changes will be effective as of the first pay period of the calendar month following the date you submit this form to your employer, or as soon as administratively possible thereafter.

## 3 SIGNATURES

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

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Employer Signature (REQUIRED) \_\_\_\_\_

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_