

15 Year Rule Notification - 403(b)

MassMutual, PO Box 1583, Hartford, CT 06144-1583

Fax Number: 877-526-2531 or 800-678-8645

Section A - Plan and Participant Information

Group No.	SSN	Employer	
Employee Name: Last, First, M.I. <input type="checkbox"/> Name Change? Please provide documentation			
*Legal Address <input type="checkbox"/> New?	Email Address		
City	State	Zip Code	Daytime Phone Number

*We will change your account information to reflect the Legal Address above and all future mailings will be sent to this address unless changed by you or your Plan Administrator as described under "State Address" in the *Important Information* Section. For your mailing address, provide either a street address or P.O. Box, not both. If you provide both, MassMutual will follow USPS Guidelines and use the PO Box as your mailing address.

Section B - 15 Year Rule Notification

I am eligible for the special higher "15 year rule" deferral limit set forth at Internal Revenue Code section 402(g)(8). Under this rule, I am a "qualified employee" as I have at least 15 years of service with my employer, a "qualified organization." Under this rule, my deferral limit will be:

For Calendar Year _____ my special 402(g)(8) deferral limit is: \$ _____

Participant Signature_____
Date

Section C - Employer Signature

We the undersigned understand and agree that the Participant is a "qualified employee" and that the Employer is a "qualified organization" as these terms are defined under Internal Revenue Code section 402(g)(8) and that deferrals made to this or any other plan funding arrangement for the calendar year set forth above will not be in excess of the limit determined under that section.

Authorized Representative Signature_____
Date

Please see IRS Publication 571 for more information regarding the 15 year rule.

Instructions:

1. **Submit the completed Notification to MassMutual at the address below.**
2. **Provide a copy to your Employer and complete a salary deferral agreement.**
3. **Make a copy for your records.**

Regular Mail Address:
MassMutual
P.O. Box 1583
Hartford, CT 06144-1583

Overnight Mail Address:
MassMutual
100 Bright Meadow Boulevard
Enfield, CT 06082