

MILFORD PUBLIC SCHOOLS

TAX SHELTERED ANNUITY ADJUSTMENT FORM  
FOR THE YEAR 2010

**CHANGES ARE MADE THE FOLLOWING PERIODS:**

FOR MARCH 12, 2010 PAYROLL - FORMS MUST BE IN PAYROLL BY FEBRUARY 25, 2010

FOR JUNE 4, 2010 PAYROLL - FORMS MUST BE IN PAYROLL BY MAY 20, 2010

FOR SEPTEMBER 10, 2010 PAYROLL- FORMS MUST BE IN PAYROLL BY AUGUST 26, 2010

FOR DECEMBER 3, 2010 PAYROLL - FORMS MUST BE IN PAYROLL BY NOVEMBER 18, 2010

**STARTING A NEW TAX SHELTER ACCOUNT**

RETURN THIS FORM AND A COPY OF THE CONFIRMATION LETTER THAT YOU RECEIVE FROM YOUR TAX SHELTER COMPANY THAT THE ACCOUNT IS OPEN

**INCREASING OR DECREASING**

RETURN THIS FORM BY THE DATES LISTED ABOVE

**CANCELLATIONS**

RETURN THIS FORM. THE DEDUCTION WILL STOP THE NEXT PAY PERIOD

TSA ADJUSTMENT FORMS MUST BE SIGNED AND DATED!

This is a / an (check one):	
_____ increase	_____ decrease
_____ new annuity	_____ cancellation
NAME	_____
SOCIAL SECURITY #	_____
EMPLOYEE ID # (required)	_____
TSA COMPANY NAME	_____
AGENT's NAME	Oldham Resource Group
AGENT's TELEPHONE #	(800) 626-6106
CURRENT DEDUCTION PER PAY	_____
CHANGE TO PER PAY	_____
_____ 03/12/2010	_____ 06/04/2010
_____ 09/10/2010	_____ 12/03/2010

← Employee must enter ID

The employee hereby agrees that the Milford Board of Education shall have no liability whatsoever for any loss suffered by the employee with regard to:

- a) the selection of any 403 (b) program
- b) the Employer's transmittal of contributions
- c) the computations in connection with the determination of the amount of salary reduction.

Date: \_\_\_\_\_ Signature: \_\_\_\_\_

Incomplete and / or incorrect forms will be returned to employee, resulting in a delay of any TSA adjustments.

RETURN TO PAYROLL