



Personal Information

Plan: Corp/Health - 0035046001 Pension - 0035046001 Forest Preserve - 0035043001
 Name: _____
 Date of Birth: _____ Account Number or SSN: _____
 Mailing Address: _____
 City: _____ State*: _____ ZIP*: _____
 Preferred Phone Number: _____ Home Cell
 Email: _____
 How would you like to be contacted if additional information is required? Telephone Email
 *NRS will use the state provided in your mailing address as your state of residency for tax purposes, unless instructed otherwise.

Retirement/Severance Information

Retirement or Severance Date (mm/dd/yy): _____ Department: _____

Accumulated Time Deferral Election

Assistance from a local Nationwide Retirement Specialist is strongly recommended when completing this section. Please call 855-457-2665 for assistance.

Upon retirement or separation from employment, Cook County plan participants may elect to defer a portion of accumulated time payments issued by their employer. Deferral amounts are subject to IRS contribution limits associated with the calendar year in which the employer issues the payment. Limits are subject to change each calendar year.

To determine maximum deferral, please select applicable contribution limit (select only one):

- Regular Limit Age 50+ Catch-Up¹ Special 457 Catch-Up²

¹Must be age 50 or over before end of calendar year in which accumulated payment is issued

²If not currently enrolled in Special 457 Catch-Up, a separate Special 457 Catch-Up Election Form must be completed. Please contact a Retirement Specialist at 855-457-2665 to receive form and determine eligibility. Failure to complete the Special 457 Catch-Up Election Form will result in defaulting to the regular limit, or — if age 50 or over — Age 50+ Catch-Up limit.

I elect the following deferral (select only one):

- 100% of eligible accumulated payment up to applicable annual IRS limit selected in section above¹
 Specific dollar amount: \$ _____ (can not be more than applicable IRS annual limit)^{1,2}

¹Incidental amounts may be paid to you as taxable income due to payroll withholdings

²If amount specified results in exceeding the applicable calendar year limit selected in the Catch-Up Eligibility Section, the requested amount will be reduced to 100% of eligible accumulated payment up to annual IRS limit.

NOTE: IRC rulings prohibit deferral of income issued after the later of 2.5 months or the end of the calendar year from the effective severance or retirement date. Participants receiving staggered payments from their employer over the course of multiple years may only be eligible to defer the first payment. Nationwide does not elect nor control the timing of the payment issue date. IRS dollar limits apply to all payroll deductions during each calendar year. Rollovers from other eligible retirement plans do not apply toward limits.

Funding Options

Deferrals of accumulated time will be allocated to the funding options in percentages as elected on the date funds are received. Election may be changed by calling 877-677-3678 or visiting cookcountyd.com.

Eligibility

Plan enrollment must be completed on or prior to retirement or severance date to be eligible to make election on this form.

Nationwide will only accept accumulated time deferrals from Cook County plan participants maintaining an open 457(b) account status at the time the funds are delivered. Delivery of payment by Cook County typically occurs 2-3 months after employment terminates. During this time, a lump sum distribution or series of disbursements that result in a remaining balance of \$0 will deem the account “closed” and ineligible to receive the deferred payment.

This form is intended only for participants receiving accumulated time payments upon retirement, severance, termination, or—in certain situations—leave of absence. Annual accumulated time payments are ineligible for deferral.

Please contact your payroll center to determine accumulated time payout eligibility.

Acknowledgment and Authorization

I hereby authorize my allocated accumulated time amounts to be contributed on my behalf to the Cook County Deferred Compensation Plan. The current contribution will continue until otherwise authorized in accordance with the Plan.

I have read and understand each of the statements on the front and back of this form. I accept these terms and understand that these statements do not cover all the details of the Plan or procedures.

Participant Signature: _____ Date: _____

Retirement Specialist Name (Print): _____

Form Return

To ensure processing, this form must be completed and returned to Nationwide Retirement Solutions on or prior to date of retirement or severance from employment. Requests received after this date are not guaranteed to be honored.

By mail: Nationwide Retirement Solutions
205 W Randolph St, Suite 1540
Chicago, IL 60606

By fax: 877-677-4329
By email: rpublic@nationwide.com