



**403(b) Maximum Amount Contributable (MAC)  
For Tax Year 2012**

**\*JEM will need this information no later than October 10, 2012, in order to process your request in a timely manner.**

- 1 Name of participant..... \_\_\_\_\_
- 2 School District..... \_\_\_\_\_
- 3 Social Security Number..... \_\_\_\_\_
- 4 Calendar year end of calculation (Enter as 12/31/XX)..... \_\_\_\_\_
- 5 Date Hired in current District..... \_\_\_\_\_
- 6 Date of Birth..... \_\_\_\_\_
- 7 Years of Service with this District..... \_\_\_\_\_  
*(If you have fewer than 15 years of service with the District, skip to Question 17)*

*Calculation of annual 402(g) long service catch-up option limit:*

- 8 Maximum Amount per year of service..... \$ 5,000
- 9 Multiply line 7 by line 8..... \$ \_\_\_\_\_
- 10 Enter the total of all your elective deferrals to all 403(b) companies for prior years you made *in this District*. ..... (Example: You contributed \$2,000 per year for the past 10 years. Enter \$2,000 x 10 years = \$20,000)  
- \$ \_\_\_\_\_
- 11 Line 9 minus line 10; if zero or less, enter 0..... \$ \_\_\_\_\_
- 12 Maximum increase in limit for long service 402(g)..... \$ 15,000
- 13 Enter the amount of all Age 50 catch-up contributions you have made while with the District..... - \$ \_\_\_\_\_
- 14 Enter the total of all prior year 402(g) long service catch-up contributions you have made after completing 15 years of service in the District ..... (Example: Employed 17 years in this District, already contributed \$7,000 to -- 402(g) long service catch-up. Enter \$7,000)  
- \$ \_\_\_\_\_
- 15 Line 12 minus line 13 minus line 14 ..... \$ \_\_\_\_\_
- 16 Maximum additional contributions..... \$ 3,000
- 17 Enter the lesser of lines of 11,15 or 16 (This is your annual 402(g) long service catch-up limit)..... \$ \_\_\_\_\_
- 18 Maximum Limit on Annual Deferrals..... \$ 17,000
- 19 Enter 403(b) or 401(k) deductions you have with another employer..... - \$ \_\_\_\_\_
- 20 If you will be 50 or over on the date in line 4 above, enter \$5,500  
If less than 50 on the date in line 4 above, enter \$0..... \$ \_\_\_\_\_

**Your Maximum Annual Contribution for this year to all 403(b) companies\* (line 17 plus 18 minus 19 plus 20)** \$ \_\_\_\_\_

\* Note: This must also be no more than 100% of compensation less pre-tax contributions to TRS, ERS, STRS, PERS, etc.  
**I have reviewed the Data above. I understand that if ANY of this information is incorrect, the above calculations may be wrong and that I may be liable for tax penalties for over contributions. I take full responsibility for the accuracy of the information.**

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