



Higher Education Employee Plan 3 Investment Program

This form is for employees of higher education institutions who will participate in Washington state Plan 3 TRS or PERS.

Give completed form to your employer.

Need help? Contact DRS.
800.547.6657 or 360.664.7000
TTY: 711 • www.drs.wa.gov

Section 1: System and Personal Information

System			
<input type="checkbox"/> TRS Teachers' Retirement System (faculty)		<input type="checkbox"/> PERS Public Employees' Retirement System (non-faculty)	
Name (Last, First, Middle)		Social Security Number	
Mailing Address	City	State	ZIP
Birthdate (mm/dd/yyyy)	Gender (optional) <input type="checkbox"/> Male <input type="checkbox"/> Female	Phone Number	
Email Address			

Section 2: Plan 3 Contribution Rate and Investment Program Selection

Choose an income contribution rate.

If you do not choose an option, your default will be Option A. Once established by selection or default, you may change your rate option only with a change of employer.

	Age	Member Contribution Rate
<input type="checkbox"/> Option A	All ages	5.0%
<input type="checkbox"/> Option B	Up to age 35	5.0%
	Ages 35 to 44	6.0%
	Ages 45 and older	7.5%
<input type="checkbox"/> Option C	Up to age 35	6.0%
	Ages 35 to 44	7.5%
	Ages 45 and older	8.5%
<input type="checkbox"/> Option D	All ages	7.0%
<input type="checkbox"/> Option E	All ages	10.0%
<input type="checkbox"/> Option F	All ages	15.0%

Choose an investment program. If you do not choose an investment program, you will be defaulted into the Self-Directed Investment Program and all of your contributions will be invested in the Retirement Strategy Fund that assumes you'll retire at age 65. You can change your investment program at any time.

Washington State Investment Board (WSIB) Investment Program

Self-Directed Investment Program

You must choose how your contributions will be invested. You may do so by phone at 888-327-5596 or online at drs.wa.gov/login. If you do not choose your investment allocations, your contributions will be invested in the Retirement Strategy Fund that assumes you'll retire at age 65.

For more information about Plan 3 investments, including a complete list of available investments, visit drs.wa.gov/plan3 or call 888-327-5596.



Section 3: Signature Required

Sign and date this form on the day you submit it to your employer.

I have selected a contribution rate and investment program. I understand that members who do not select a contribution rate will be assigned the current default rate of 5%.

Once selected or defaulted, the contribution rate is permanent, but Plan 3 PERS and TRS members may change their investment program at any time.

Signature

Date

Your Social Security number is needed so DRS can report to the IRS any funds paid to you. DRS will not disclose your Social Security number unless required to do so by law. See IRC sections 6041(a) and 6109.

Return the completed form to your employer.

Section 5: To Be Completed by Employer

Employer Name and Mailing Address

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Reporting Group

Employers: Mail the original of this form to DRS. Department of Retirement Systems; PO Box 48380; Olympia, WA 98504-8380