

TIAA Retirement is available to JSU Employees as follows **(NOTE: This is an optional plan, unlike RSA which is mandatory)**:

- The Supplemental Retirement Plan is available to all full-time employees immediately upon employment. The employee must establish an account with TIAA and complete the TIAA Salary Reduction Form to enroll. **Deductions are not automatic.**
- The Matched Supplemental Retirement Plan is available to all full-time employees after 2 years of continuous employment. The employee must establish an account with TIAA and complete the TIAA Salary Reduction Form to enroll (NOTE: need to fill out even if the employee is already enrolled in the Supplemental Retirement Plan noted above as these are different programs and accounts with TIAA – different IRS regulations and guidelines apply). **Deductions and match are not automatic.**
- **WARNING:** There are IRS limitations on employee contributions. It is the employee's responsibility to understand these rules.

The following are instructions on how to access the TIAA Salary Reduction Form via your MyJaxState. If you have questions, please contact Benefits at 256.782.5007 or benefits@jsu.edu.

Sign into MyJaxState from the jsu.edu homepage:

jsu.edu

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College of Social and Behavioral Sciences	Graduate School

Enter username and password:

JAX STATE Single Sign-On
Jacksonville State University

Login

Sign in to MyJaxState

Sign In

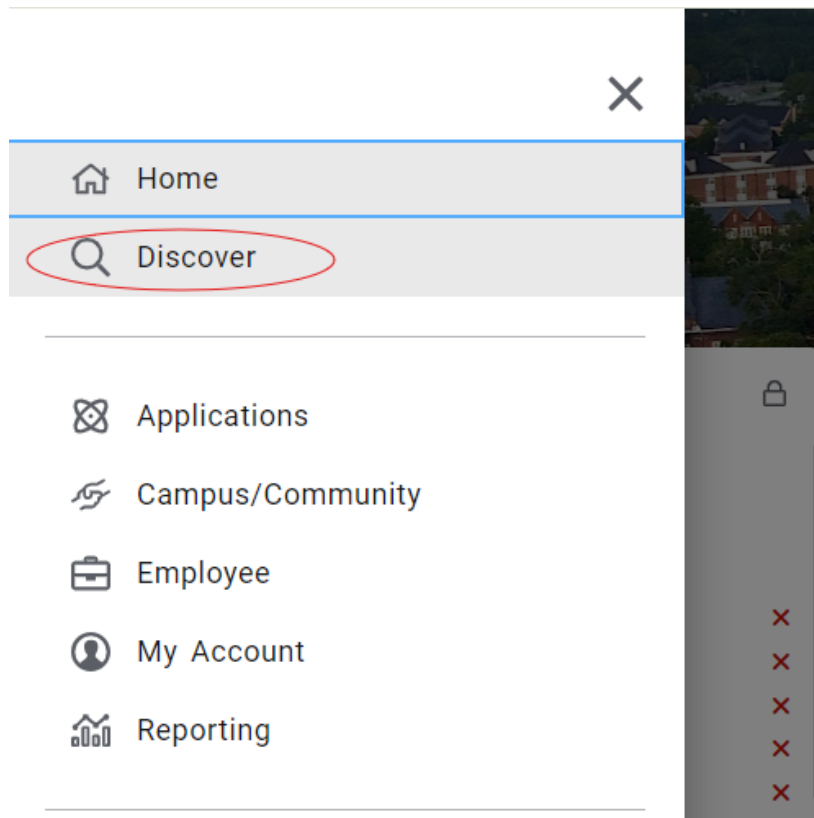
Need Help?

Change your MyJaxState Password
Reset your MyJaxState Password

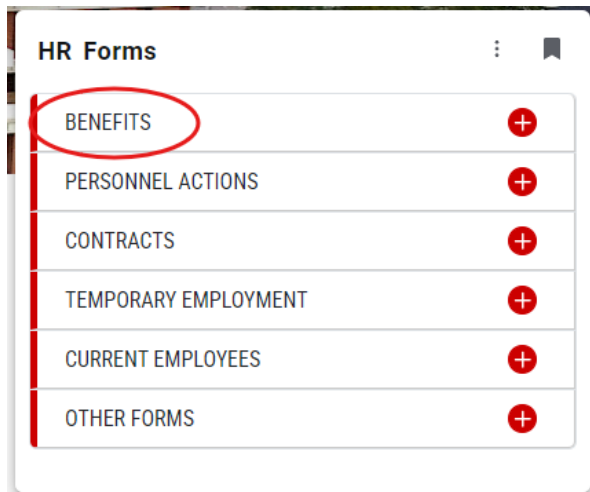
Technology Support Center

- Phone: 256.782.8324 (TECH)
- E-Mail: techsupport@jsu.edu
- Web: http://www.jsu.edu/it

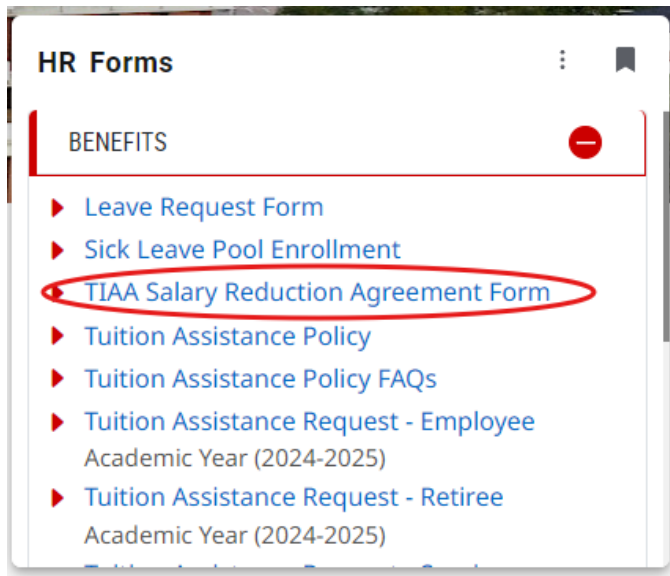
Select the 3 lines at the top left of the screen and select Discover:



Search for **HR FORMS** and select the dropdown for **BENEFITS**:



The TIAA Salary Reduction Agreement Form is the link you will need to access:



Enter your information into the TIAA SALARY REDUCTION AGREEMENT:



Jacksonville State University
Department of Human Resources
700 Pelham Rd N., 326A Angle Hall, Jacksonville, AL 36265
Phone: (256) 782-5007
www.jsu.edu/hr

TIAA SALARY REDUCTION AGREEMENT

First Name: * Last Name: *
Email Address: * Employee ID# * Phone Number: *

Eligibility for the Supplemental is immediate and eligibility for the Matched Retirement is after the 2-year waiting period – choose your option:

I understand that:

- Participation in Jacksonville State University's Retirement Annuities (403b plan) is optional and contribution amounts are at my discretion.
- TIAA is the Supplemental Retirement Provider of Jacksonville State University's retirement plan.
- All contributions are on a pre-taxed basis (not to exceed applicable legal limitations) and will reduce my monthly or bi-weekly income.
- The JSU 1% contribution requires completion of a TIAA Salary Reduction Agreement Form AND enrollment online with TIAA as outlined at the bottom of this form. **The 1% JSU Contribution is not automatic.**

I am eligible to participate in the Matched Retirement Plan:

- Beginning the first of the month after the standard waiting period of two (2) calendar years of continuous employment
- Immediately, if I am coming from another higher educational institution with no lapse in employment and have participated for two years (written documentation is required)
- If I chose not to contribute, JSU will contribute 1% on my behalf after the standard waiting period of two (2) calendar years of continuous employment

I am eligible to participate in the Supplemental Plan:

- If I am not eligible for the matching account

This Agreement shall be legally binding and irrevocable as to each of the parties hereto while employment continues; provided, however, that either party may terminate this Agreement as of the end of any month, so that it will not apply to salary subsequently earned, by giving at least thirty days written notice of the date of termination.

IMPORTANT

Matched Retirement availability begins after 2-years employment

Supplemental Retirement availability begins immediately after initial employment

Below are the max contribution percentages allowed for the Matched Retirement on the form:

Matched Retirement

Eligible for Matching:

Employee Contribution	JSU Contribution
0%	1%
3%	3%
4%	4%
5%	5%

Matching Contribution: %

Choose your percentage of contribution (note there are IRS limitations):

Additional Retirement

Employee Contribution:

%

(This amount is the excess of contributions greater than the match by JSU)

How would you like your Retirement Choice Plus Plan to be taxed?

-- Please Select --

Retirement Choice Plus Plan (cashable)

Eligible for Supplemental: -- Please Select --

Employee Contribution:

%

Total of all above options: 0 %

The option(s) selected above represent a total salary reduction percentage, which produces a total institutional retirement contribution that does not exceed the requirements of Section 403(b) of the Internal Revenue Code.

*A Roth option is now available on the Supplemental (Retirement Choice Plus) Plan.

The Matching (Retirement Choice) Plan must be traditional pre-tax.

IMPORTANT

Sign and submit the document:

I have read and understand the terms of this Agreement. My signature below confirms my understanding of this Agreement.

You must enroll before your Salary Reduction Agreement can be processed

To Enroll Online:

Go to www.tiaa.org/jacksonvillestate and click "Enroll Now." Next, click the plan name under THE "Online Enrollment" section. You will come to the "Welcome" page. Once on this page:

- Enter your User ID and click "Log In" if you have an established TIAA User ID and Password.
- Click "Register with TIAA" if you are a first-time user and need to create your User ID and Password.
- Follow the on-screen directions to complete your enrollment application.

For HR Use Only: (include matching eligibility verified)

Effective Date:

It is important to set up a TIAA account to enable the processing of the Salary Reduction Agreement.
