

ANNUAL LEAVE LUMP SUM DEFERRAL FORM

Employee Name:		SSN:	
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Effective July 1, 2007, state employees who terminate employment may defer their unused annual leave payment to a Texa\$aver 401(k) and/or 457 Plan account.

Annual Leave Balance (Hours):		Balance as of:	
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Please check the appropriate box(es):

Before-Tax:

Plan	Contribution Type	Amount/Percentage	YTD Contributions (optional)
401(k)	☐ Flat amount		
	☐ Percentage		
	☐ Max amount		
457	☐ Flat amount		
	☐ Percentage		
	☐ Max amount		

After-Tax:

Plan	Contribution Type	Amount/Percentage	YTD Contributions (optional)
401(k) Roth	☐ Flat amount		
	☐ Percentage		
	☐ Max amount		
457 Roth	☐ Flat amount		
	☐ Percentage		
	☐ Max amount		

Signature: _____

Date:

Form must be returned to payrollteam@trs.texas.gov no later than the last day of employment.

Note: Deferrals are subject to IRS and Texa\$aver contribution limits. Contact our Benefits Team (OE) and/or Texa\$aver for questions regarding contribution eligibility.