



ONE CITY. ONE JACKSONVILLE.

Check list for Deferred Compensation Contributions

_____ 3 Year Catch Up

If you would like to utilize the full **3 YEAR CATCH UP**, contact one of the Empower Retirement Plan Advisors to get the necessary information you need to fill out the Participant Action Form 4 years prior to the year of your retirement date.

Empower Retirement Plan Advisors:

Christina Jamieson Office **904.255.5568** Mobile **904.252-4714**

eMail: Christina.jamieson@empower-retirement.com

Zach Alder Office **904.255.5569**, Mobile **904-522.3645**

eMail: Zachary.Alder@empower-retirement.com

_____ Term Leave Pay to Defer

If you would like to defer the money from your Term Leave Pay, please contact one the Empower Retirement Plan Advisors to fill out the Participant Action Form 2 months prior to your retirement date.

PLEASE TAKE NOTE OF THE DEADLINE TO COMPLY WITH THE IRS RULES!

You must sign the deferral form in the month prior to the Term Leave Payout date!

For example, if you are retiring June 1, 2021 and deferring your term leave pay, the last payroll date you can do a deferment is on your last full paycheck in May which is 28-MAY-2021 PR hence your Participant Action Form must be completed, signed and dated on or before April 30, 2021.

_____ Submit your Completed Participant Action Form

For JFRD and JSO Employees: Contact one of the Empower Plan Advisors to complete/sign the Participant Action Form then submit a copy of the signed form to JFRD Payroll: Bebernitz, Haley HaleyB@coj.net or JSO Payroll: Thyselius, Autumn A Autumn.Thyselius@jaxsheriff.org

All other Department Employees: Contact one of the Empower Plan Advisors to complete/sign the Participant Action Form then submit a copy of the signed form to HR at City Hall, Suite 100 or email DataMgtRequests@coj.net

_____ Verify your paystub to ensure your Deferred Comp Contribution amount is correct

If you have any question, please call Rebecca Cooper at 904.255.5556