Salary Reduction Agreement Form

Start/Change/Stop 403(b) Supplemental Retirement Plan Contribution

1. Sign into my.wisconsin.edu

2. Click on the **Forms** tile.

3. Select the **Salary Reduction Agreement** tab on the left side menu.
   WARNING: The form will open in a new tab. If the form does not open, enable pop ups from this site.

4. To begin a new 403(b) contribution, click on **Add a SRA eForm**.

5. Enter C**ontact Preference**.

6. Enter the **Contact Information**.

7. Select **Yes** or **No** in Other Retirement.
   NOTE: If you contributed to another voluntary retirement plan under another employer or own 50% of a business with a retirement plan, choose yes.

8. Select **Yes** or **No** for Business.

9. Click on the magnifying glass for the **Pay Check Date** field and choose the paycheck you want the new contributions to begin.

10. Select the **Type of Enrollment Change**. Additional fields will begin to display as options are chosen.

11. Choose a 403(b) provider from the drop-down menu. Indicate if you already have an account set up with the provider chosen.

12. Choose whether contributions should be taken **Before Tax or After Tax** (Roth).

13. Enter either a flat dollar amount as shown below or you can choose a percentage of salary – but not both.

1 row

	*Pay Check Date	*Type of Enrollment Change	*403b Provider	UW Account with Provider	*Before-Tax or After-Tax	*$ Amount or % Percent	*Flat Amount ($)	Insert A Row	Delete A Row
1	01/13/2022	Start	Fidelity Investments	Yes	Before-Tax	Flat Dollar Amount	100.00	+	−

14. Read the Acknowledgement page and switch the toggle from **No** to **Yes** indicating you agree to the terms.

15. Click the **Save** button at the bottom of the screen to save your progress.

16. Click the **Submit** button to finalize your enrollment.

17. You will receive a results page indicating that your enrollment has been submitted for approval.