To Be Used for Changes to Retirement Choice Election

For Service & Maintenance staff hired on or after January 23, 2022

Retirement Choice Election Change Form

(Must be submitted to Employee Service Center before the close of your election window)

IMPORTANT: If you have previously made a Retirement Choice election and wish to change your election, you must complete this form and submit it to the Employee Service Center (ESC) by e-mail at employee.services@yale.edu, by fax at 203-432-5153, or by hand delivery to 221 Whitney Avenue, New Haven before the close of your election window. Changes to your initial election choice cannot be made by you in Workday.

Completed change forms must be signed, dated and submitted to the Employee Service Center before the close of your election window.

First Name:		Last Name:	
Net ID:		Employee ID:	

I want to *change* my election and participate in the following retirement program: *(Choose only one.)*

☐ Yale University Retirement Account Plan (a 403(b) savings plan)

☐ Yale Staff Pension Plan and the Matching Retirement Plan (a 403(b) savings plan)

Employee Signature **Date**

Important Notes:

- Please review the Retirement Choice brochure before making your change election.
- At the end of your election window, your latest election will be irrevocable, meaning the decision may not be changed.
- After your election window ends, you will receive a statement confirming your retirement program.
- If you have any questions, call Employee Services at (203) 432-5552.

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