

## LARGER ANNUITY INITIATION OR CHANGE OF CONTRIBUTION AMOUNT

\_\_\_\_\_  
(Print) Last Name

\_\_\_\_\_  
First Name

\_\_\_\_\_  
Middle Name

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Work Phone Number

### Contribution Options:

1. Lump-sum contribution \$ \_\_\_\_\_  
(The maximum annual post-tax contribution is limited by the Internal Revenue Code.)

2. Biweekly contribution\* from pay check (after-tax only) \$ \_\_\_\_\_  
(The minimum biweekly contribution is \$5 per pay period.)

3. Trustee-to-trustee transfer/rollover from other qualified retirement fund \_\_\_\_\_ (please initial)  
(For a trustee-to-trustee transfer/rollover, this form only serves as notification to LACERS that you intend to initiate such a transfer. **Roth IRA rollovers are not permitted.** Please contact the retirement plan from which the funds will be coming to determine their procedure for making the transfer/rollover to LACERS.)

Name of Retirement Fund \_\_\_\_\_

### Investment Options:

1. Interest credited monthly is the same as that credited to regular member contributions and is based on the 5-year Treasury note.
2. Investment return on account based on the net-of-fees return of the publicly-traded portion of LACERS' investment portfolio. **The rate of return may be positive or negative.**

I understand that interest/investment return will be credited to my account only after the funds are on deposit for a full calendar month. I further understand that requests for changes to my Larger Annuity contribution must be made in writing to the LACERS.

Signature \_\_\_\_\_

Date \_\_\_\_\_

**For LACERS Use Only**

Verified by \_\_\_\_\_ Date \_\_\_\_\_