

## Archdiocese of Washington 403(b) Plan Contribution Instructions

Please use the 403(b) Contribution Transmittal Form when remitting employee 403(b) contributions to our approved vendors. A separate form within the Excel Workbook has been created for each of the current 5 vendors participating in our 403(b) program.

The following information should be completed

- Parish/School Agency Name
- Tax Year. The 403(b) vendor may reject the file if you do not include this information. This is particularly important at the beginning/end of a Tax Year. For payroll dates in 2012 please enter 2012 for tax year. For payroll dates in 2013 please enter 2013, etc..
- Payroll Date: This is the actual payroll pay date. Not the period ending date.
- Participant Name
- Social Security Number
- Employee Contribution: The Archdiocese of Washington Plan does **not** currently provide Employer Contributions. All contributions to the plan for Lay and Clergy<sup>1</sup> should be **Employee Only** contributions.

Please mail this form and payment to the approved vendors within **15** business days following the end of the month in which the amount would otherwise have been paid to the employee. *Example: Contributions deducted for the 2/17/2012 pay date must be submitted to the vendor by March 21, 2012.*

**This form can be saved on your computer for future use.**

The Office of Human Resources is here to assist you. Should you have any questions on the Archdiocesan 403(b) program please contact us at:

- **Email:** [ArchdioceseHR@adw.org](mailto:ArchdioceseHR@adw.org) Please indicate "403(b)" in the subject line.
- **Phone:** 301.853.4513 option 1 or 301.853.4500 when calling please reference that you have questions about the 403(b) plan to ensure that you are transferred to the appropriate HR staff member.
- **Fax:** 301.853.7680.

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<sup>1</sup> Although the Archdiocese of Washington does provide a match for Clergy contributions, the common practice has been to add the match to the gross remuneration and then deduct the total 403(b) contribution via payroll. As such, it appears as an Employee Contribution for tax purposes and is accordingly subject to IRS limits. Should you have additional questions regarding clergy 403(b) match please contact Parish & School Financial Operations at (301) 853-5355.