

# Pioneer Investments Retirement Plans

## Simple IRA Deferral Agreement

**Important: Please return this form to your employer to keep on record; do not send to Pioneer.**

**If you are terminating your contributions to the plan, you only need to complete Sections 3 and 4.**

### 1 Employee Information

Company Name

Address

City

State

Zip Code

### 2 Salary Deferral Election

Subject to the requirements of my employer's SIMPLE plan, I authorize the following to be withheld from my pay each pay period and contributed to my Pioneer SIMPLE IRA as a salary deferral contribution:

A. \_\_\_\_\_ % of my pay,

**OR**

B. \$\_\_\_\_\_ per pay period,

**OR**

C. A one-time deferral contribution of \_\_\_\_\_ as of \_\_\_\_\_ (Insert date that you want this amount to be withheld from your pay.)

Your total salary deferral contributions cannot exceed \$10,500 (\$13,000 if you are age 50 or older).\*

Your salary deferral contributions will start as soon as permitted under the SIMPLE plan as soon as administratively feasible.

\* Contribution limit tied to cost-of-living adjustments and will be raised in \$500 increments.

### 3 Termination of Salary Deferral

I understand that if I stop my salary deferral contributions into the plan, I may start again only as indicated in Article II, Item 2D on Form 5304-SIMPLE.

Please stop my salary deferral contributions as of \_\_\_\_\_

### 4 Signature

This Salary Deferral Agreement replaces any previous agreement and will remain in effect as long as I am eligible to participate in the SIMPLE plan, or until I provide my employer with a new Salary Deferral Agreement as permitted under this SIMPLE plan. I understand that I have the right to select the financial institution for my SIMPLE IRA contributions. I hereby select Pioneer Investment Management USA Inc. to serve as Custodian of my SIMPLE IRA.

Employee Name

Social Security Number

Address

Date

