

## Questionnaire: 401(k) Contribution Reporting Form

This form is not to enroll you in the 401(k) Plan with Fidelity nor to rollover money. This form is required to ensure that you do not exceed the IRS maximum contribution limit for this year, as well as to make sure your W-2 correctly reflects your 401(k) contributions.

Did you participate in any 401(k) Plan this year prior to this new employment?

- NO. (If your answer is no, you do not need to complete nor return this form to payroll.)
- YES. (If your answer is yes, you must complete the below information, and return it within 45 calendar days of your start date)

---

**Yes, I participated in another 401(k) Plan this year (or in a 403(b) Plan, 408(k)(6) SARSEP Plan, Governmental 457(b) Plan or a Conduit IRA)**

Today's Date: \_\_\_\_\_

Your full Legal name: \_\_\_\_\_

CareerSetting ID#: \_\_\_\_\_

To find your ID, log into Career Settings (if prompted for Company ID, please use **publicisgr**), search for your name in the search bar, click on your name, and locate the Career Settings ID number underneath your 'Profile' tab)

Please note: If applicable, you need to fill out your employee pre-tax contributions as well as any post-tax contributions under a Roth 401(k) Plan for this year [not a Roth IRA]. You can find this information in your final paystub from your prior employer(s). Otherwise, you may have to contact your prior employer(s)' payroll department to get this information.

Prior employee pre-tax 401(k) contribution for this year: \$ \_\_\_\_\_

Prior Roth Payroll 401(k) post-tax contribution for this year: \$ \_\_\_\_\_

Prior employee catch-up contribution for this year: \$ \_\_\_\_\_

Note: Catch-up contributions apply to one who is age 50 or older

Submit the completed form through [ServiceNow](#) and choose Category: Benefits when creating the ticket. If your agency is not yet onboarded to [ServiceNow](#) for payroll-related requests, ask your HR representative to submit the ServiceNow request on your behalf.

[Submit a ServiceNow Ticket](#)