

INVESTMENT AGREEMENT FOR THE
KANSAS BOARD OF REGENTS (KBOR) VOLUNTARY RETIREMENT PLAN
Pittsburg State University

Please note that this form is to be used only for pre-tax contributions to the Voluntary Retirement Plan. Any change you make on this form will affect only your pre-tax contributions. You can also utilize the Roth After-Tax option at the same time. If you want to enroll in or make changes to your Roth contributions to the Voluntary Retirement Plan, you must complete a "V-Roth After-Tax Investment Agreement."

Check one: [ ] New Enrollment [ ] Change Contribution Elections [ ] Terminate Contribution Elections

This Investment Agreement ("Agreement") is entered into between the undersigned employee ("Employee") of Pittsburg State University ("Employer") in order for contributions to be made to the KBOR Voluntary Retirement Plan ("Plan") under Internal Revenue Code (IRC) Section 403(b) and K.S.A. § 74-4925b.

I. AUTHORIZATION TO MAKE SALARY REDUCTIONS

I understand that my participation in the Plan is voluntary, and that I may choose to contribute either a percentage or dollar amount of my salary per pay period, subject to the limitations of Sections 402(g), 414(v) and 415 of the IRC, which amount will be contributed by my Employer to the Plan.

I hereby direct my Employer to reduce my salary per pay period and contribute this amount as a pre-tax contribution to the Plan. (Note: if you also wish to make Roth contributions to the Plan, you will need to complete the V-Roth After-Tax Investment Agreement. BOTH pre-tax and Roth contributions will be aggregated to determine the maximum amount permissible to the Plan under the IRC.)

Please check one box: [ ] % [ ] \$ [ ] The maximum permissible amount under the IRC, including all catch-up provisions.

IMPORTANT: Notwithstanding your election, effective January 1, 2026, if you are eligible for age 50 catch-up contributions and your FICA wages from your Employer exceed the wage limit for the prior year, you will be deemed to have elected for your age 50 catch-up contributions, if any, for the current year to be made as Roth contributions to the extent required by applicable law and the Plan. You may make an election to change your age 50 catch-up contribution amount, including to cease making catch-up contributions, by entering into a new Agreement or terminating this Agreement, as applicable, at any time.

II. INVESTMENT PROVIDER SELECTION

I direct my Employer to forward the amounts by which my salary is reduced under the Plan to the following investment provider, which has been approved by KBOR to provide investment options under the Plan (please see listing at http://www.kansasregents.org/vtsa).

Name of Investment Provider - Voya or TIAA

Name of Authorized Agent

I represent that I have completed all necessary forms with the above-identified investment provider to direct the investment of my pre-tax contributions under the Plan. I understand that I am responsible for selecting an investment provider and investment options offered by that provider.

III. EFFECTIVE DATE OF AGREEMENT

I understand that this Agreement will be effective as of the first pay period following the date I complete the Agreement and return it to Human Resources; provided, however, that if I am not eligible to participate in the Plan, this Agreement will be effective as of the first pay period following the date I become eligible to participate in the Plan. I further understand that this Agreement is only effective with respect to salary received by me after its effective date. I understand that this Agreement is legally binding and irrevocable with respect to salary received by me while the Agreement is in effect.

IV. DURATION OF AGREEMENT

This Agreement will continue from year to year unless I change or terminate it. I am free to change or terminate the Agreement at any time by submitting a new V-Pre-Tax Investment Agreement to Human Resources and the change to or termination of my contribution will be effective as provided hereunder; provided, however, that I may change my investment provider only one time each calendar year. The Board may reduce or discontinue my contributions in any year in which this Agreement is in effect if necessary to comply with applicable provisions of the IRC. If I terminate employment with my Employer, this Agreement shall automatically terminate, or if the Board terminates the Plan, this Agreement shall automatically terminate.

V. EMPLOYEE INFORMATION

Employee Name (First, M.I., Last) Please Print

PSU Employee ID Number

Date

Employee Signature

For HR use only:

Accepted for the Board of Regents Human Resources Representative Date

Effective Date:

- If New or Change Contribution (first day of the pay period with the contribution): Pay Period Start Date Paycheck Start Date
If Stop Contribution (last day of the pay period with the contribution): Pay Period End Date Date No Contribution on Paycheck