

Archdiocese of Miami



Bookkeeper 403(b) Checklist for New Hires - Transamerica

CHECKLIST		
<input type="checkbox"/>	Provide employee with the "easy access" flyer	Located in the e-library under Human Resources/Benefits
<input type="checkbox"/>	Provide employee with the Guide to 403(b) Retirement Plan	Located in the e-library under Human Resources/Benefits
<input type="checkbox"/>	Inform employee that he/she will need to set up online access at adom.trretire.com after the first pay check. Online access can also be created by calling 800-755-5801.	
<input type="checkbox"/>	If employee is declining participation, he/she will need to make the amount selection to "0" under "contributions". Otherwise 3% will automatically be deducted.	
<input type="checkbox"/>	If employee is making contributions, please make sure that the beneficiary section is completed. (If spouse is designated as a beneficiary, there is no need to mail it the form to HR)	
<input type="checkbox"/>	If married and the employee designates someone other than spouse as a primary beneficiary, consent form will be required.	
<input type="checkbox"/>	Inform employee that the home address in Paylocity and Transamerica need to both match to prevent any issues in receiving correspondence.	