



Outside Retirement Plan Contributions Worksheet

You should complete this worksheet by March 1st of each year and return it to the RF if you meet all of the following criteria:

- You participated in The Research Foundation for SUNY Optional Retirement Plan in the prior year
- You own controlling interest (over 50%) of an outside, for-profit business
- You make contributions to a qualified retirement plan or SEP-IRA through that outside business

Employee Information

Name _____

Employee ID _____

Phone Number _____

E-mail Address _____

Please answer the following about your outside business activities in the prior calendar year.

1. What is the limitation year of the qualified plan or Simplified Employee Pension/IRA?
A limitation year is the 12 month cycle for which contribution testing is performed. _____
2. What was the total annual addition to the qualified plan or SEP-IRA during the limitation year (excluding age 50 catch-up contributions)? _____
3. What was your total compensation during the limitation year? _____

Signatures

If this form is being completed by someone other than the employee, please provide the following information in the event that there is follow-up required.

Signature of Person Completing This Form

Title/Phone Number

Participant Signature

Date

Please complete and return this form to
Toni Conlin
The Research Foundation for SUNY
35 State Street, 4th floor
Albany, NY 12207