

Change Investment Companies

BSA Retirement Plan:

- Contact the Benefits Office at extension 7516
- Complete BSA Retirement Plan Allocation Form
- If you do not have an account with the investment company you wish to add, you will need to complete the investment company application
- The Benefits Office will supply you with the investment company application
- The completed paperwork will be submitted to Payroll by the Benefits Office
- The Benefits Office will supply you with a Transfer Form to move monies from one investment company to another

BSA 401(k) Plan:

- Contact the Benefits Office at extension 7516 or download the BSA 401(k) Plan Agreement for Salary Reduction from our website
- Complete the Agreement for Salary Reduction Form
- If you do not have an account with the investment company you wish to add, you will need to complete the investment company application
- The Benefits Office will supply you with the investment company application
- The complete paperwork will be submitted to Payroll by the Benefits Office or you
- The Benefits Office will supply you with a Transfer Form to move monies from one investment company to another