



403(b) Tax Sheltered Annuity (TSA) *(Retirement Savings Plan)*

As an employee of the Diocese of San Jose, you are eligible to participate in the 403(b) Tax-Sheltered Annuity (TSA) plan. An individual's 403(b) annuity can be obtained only under an employer's TSA plan.

Participation in the 403(b) TSA is voluntary and may be done at any time at the employee's discretion. There will be **no matching contribution**.

The Diocese of San Jose 403(b) TSA Plan is administered by Employee Benefits Services (EBS). Employee may choose any investment company as long as it meets the Information-Sharing Agreement with the Diocese of San Jose as an approved company. Investment options include mutual funds and annuities. You control how your funds are invested by consulting with a representative of the vendor you select.

To enroll in the 403(b) Tax-Sheltered Annuity Plan please contact:

- A financial advisor of your choice **or**
- Employee Benefits Services (EBS) Representatives:
 Clara Zaya (408) 666-6917 czaya@ebenefitsservices.net
 EBS Office (408) 978-1000

Once your 403(b) TSA account has been set up and ready to accept contributions, please complete the 403(b) Salary Reduction Agreement (SRA) located at www.dsj.org/employees/retirement and submit completed SRA to benefits@dsj.org to commence your contributions.

If you have any questions, please feel free to contact DSJ Benefits Department at (408)983-0249 or benefits@dsj.org .