

FLEXIBLE BENEFITS PLAN CHANGE IN STATUS FORM

Please Complete And Sign On Page Two

Company Name (Print) _____

Employee Information

Employee Name (Print) _____ Social Security Number _____

Address _____

Check if new address ☐

Former Name _____

PART I: Change in Status

I have had the following change in status (as defined in the Plan) since I signed the Election Form (check one):

☐ Leave of Absence and/or Layoff

Date of Leave/Layoff: ____ / ____ / ____

Date of Last Payroll Deduction: ____ / ____ / ____

Expected Return Date: ____ / ____ / ____

Will be making up contributions: ☐ Yes / ☐ No

☐ I have terminated employment.

Date of last payroll deduction: ____ / ____ / ____

Date of termination: ____ / ____ / ____

☐ I have married.

☐ I have divorced or legally separated or my marriage has been annulled.

☐ I have had a child (by birth, adoption or placement for adoption).

☐ I have had the following change in employment status which affects my eligibility for benefits

Explain: _____

☐ My spouse or dependent has had the following change which affects his or her eligibility for benefits.

Please identify which benefit(s) have been affected by this change: _____

☐ I am returning from FMLA leave and elect to reinstate my election with respect to Employer's group health insurance plan [and/or the Health/Daycare Spending Account(s)].

☐ My cost for dependent care services has increased or decreased and I elect to make a corresponding change under my Dependent Care Spending Account. (Note-an election change is not permitted in this situation if your dependent care provider is your relative.)

☐ Other: I feel that I have a change in status NOT listed above.

Explain: _____

If I have a change in status as indicated above, I understand that I may change my election only if it is on account of, and corresponds with the change. For further explanation please contact your account manager.

See Other Side

PART II: Benefit Election Changes

In accordance with the change in status described above, I elect to change my benefit election under the Plan.

Please change the amount of my election as follows:

From Per Pay Period **To** Per Pay Period

☐ Pre-Tax Insurance Premium Amount

Medical \$ _____

\$ _____

\$ _____

Dental \$ _____

\$ _____

\$ _____

☐ Health Care Flexible Spending Account

\$ _____

\$ _____

☐ Dependent Care Flexible Spending Account

\$ _____

\$ _____

Effective Date ____ / ____ / ____

Date of first payroll deduction in which change applies ____ / ____ / ____

NEW ANNUAL HEALTH CARE FSA \$ _____ (to be verified by employer)

NEW ANNUAL DEPENDENT CARE FSA \$ _____ (to be verified by employer)

PART III: Participant Representations

I understand that the change in my election, as indicated above, will be effective at the time prescribed by the plan administrator. I also understand that this election may not be changed during the remainder of the plan year (ending) unless I have another change for which federal law permits me to make a new election.

I CERTIFY THAT ALL THE INFORMATION IN THIS DOCUMENT IS TRUE. I AGREE TO SUPPLY ANY ADDITIONAL INFORMATION THAT THE PLAN ADMINISTRATOR, IN ITS DISCRETION, DETERMINES IS NECESSARY TO PROCESS MY REQUEST FOR A CHANGE IN MY BENEFIT ELECTION.

Employee's Signature _____ Date ____ / ____ / ____

Human Resources Representative _____ Date ____ / ____ / ____

Note: If employee terminates we do not need their signature.

Please Return this Form to:

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