FINANCIAL SERVICES
FOR THE GREATER GOOD®

Plan Number 150573
Plan Name GEORGE FOX UNIVERSITY TAX DEFERRED ANNUITY PLAN **Employer Name** GEORGE FOX UNIVERSITY
Plan Type 403(b) TDA

Plan Profile

Address:	414 NORTH MERIDIAN STREET
City:	NEWBERG
State:	OR
Zip:	97132 - 2697
Plan Administrator:	DIRECTOR OF HUMAN RESOURCES
Employer Identification Number:	93-0386839
IRS Plan Number:	002
Plan Subject to ERISA:	NO
Plan Subject to TAMRA:	NO
Plan Effective Date:	01/01/1963
Plan Status:	ACTIVE
Plan Year End:	06/30

Employer Type:	CHURCH
Organizational Type:	UNIVERSITY

Eligibility

Eligible Employee Class: All - Full Time

Waiting Period Requirements:

Service Method: **Computation Period:**

Contributions/Transfers In | Plan Rules

Sources Available for Contributions

Source Name
ROLLOVER
EMPLOYEE PRE-TAX

Sources Restricted for Contributions

Source Name
ASSET TRANSFER RESTRICTED
EMPLOYEE AFTER-TAX

Rollovers	
Rollovers are Accepted:	YES
Acceptable Rollover Types:	403(b)1,403(b)7,401(a),403(a),401(k),457(b) Public,408 (Classic-IRA)

Misc.	
Do contribution allocation changes require plan sponsor approval?	NO
Last day of plan year rule requirement for employer contributions:	
Hours of service requirement:	

Contributions/Transfers In | Administration

Forfeitures	
Is a forfeiture account used:	
How are forfeiture proceeds used:	

Contributions/Transfers In | Calculation Limits

Age 50 catch up contributions allowed:	YES
15 year catch up contributions allowed:	YES

Contributions/Transfers In | Transfers In

Sources Available for Transfers In

Source Name
ASSET TRANSFER RESTRICTED
ROLLOVER
EMPLOYEE PRE-TAX
EMPLOYEE AFTER-TAX

Direct Transfers In allowed from same plan from approved alternate carriers:	YES
Plan accepts Transfers In from a different plan:	NO

No Restricted Sources Found for Transfers In

Transfers Out | External Transfers

Transfers allowed to approved alternate carriers:	NO
Alternate carrier employer approval required:	NO

Loans

Does the plan allow the issuance of new loans:	YES
Loan Plan Allowed/Based on:	Collateralized loans
Loan Type:	GSRA
Number of Loans Allowed for this plan:	2
Employer Restriction on Maximum Loan Amount:	50,000
Spousal Waiver Required:	YES

Sources Available for Loans

Source Name
ROLLOVER
EMPLOYEE PRE-TAX
EMPLOYEE AFTER-TAX

Sources Restricted for Loans

Source Name
ASSET TRANSFER RESTRICTED

Withdrawals/Distributions | Post Termination

Lump Sum / Cash (Post-Termination)	
Lump Sum Cash After Separation:	YES
TIAA Traditional Transfer Payout Annuity (TPA) After Separation:	YES
Lump Sum Distribution Age/Source/Service Requirement:	
% of Accumulation Available:	
Are Rollover - In Source(s) available anytime:	YES
Employer Approval Required:	Approval required when no termination date is on file
Forced Distribution:	NO
Small Sum Cash Policy:	YES
Non-spouse rollovers to inherited IRA's:	YES
Retirement / Recurring Payment (Post-Termination)	
Normal Retirement Age:	65.00
Spousal Waiver (Post-Termination)	
Spousal Waiver Required:	YES

Withdrawals/Distributions | In Service

Age and/or Service Withdrawals (In-Service)	
Allowed:	YES
Age/Source/Service Requirement:	Account Balance Available: 100% Minimum Age: 59 ½
Employer Approval Required:	NO
Unforeseeable Emergency/Hardship Withdrawals (In-Service)	
Allowed:	YES
Sources available for Hardship:	EMPLOYEE ONLY
Safe Harbor provisions Followed:	YES
Employee Suspension:	6 Months
Employer Suspension:	Not Applicable
Does the plan allow for unforeseeable emergency withdrawals	NO
Employer Approval Required:	YES
Compliance Verification:	Use internal compliance verification methods
Disability Withdrawals (In-Service)	
Allowed:	NO
Age Requirement:	
Service Requirement:	
Employer Approval Required:	NO
Other Distribution Rules (In-Service)	
Allowed:	NO
Employer Approval Required:	NO
Transfers Allowed to Purchase Service Credits:	NO
Employer Approval for Transfers to Purchase Service Credits:	NO
Are Rollover - In Source(s) available anytime:	YES
Spousal Waiver (In-Service)	
Spousal Waiver Required:	YES

Vesting / Entitlement

Vesting			
Source *	**Vesting Type**	**Vesting Formula**	**Vesting Start Date Indicator**
ASSET TRANSFER RESTRICTED	Immediately Vested	100% full and immediate	

* all employee sources are fully and immediately vested

Special Topics | Divorce

Employer Approval for a QDRO:	No
Special Spousal Benefits Rules:	