

Brandeis University

Office of Human Resources
Benefits section · MS 118 · 781-736-4468

Flexible Reimbursement Account Enrollment / Change / Cancellation Form for Plan Year 2008

Employee Information

Name: _____ SSN: _____

Address: _____
(Street) (City) (State) (Zip code)

Department: _____ Mailstop: _____ Ext: _____

Please select:
(Check one)

Pay Cycle: Weekly (48 pay periods/year) Semi-Monthly (24 pay periods/year)

Do you take an Unpaid Leave of Absence in the summer or work less than 52 weeks/year?

Staff []

Yes No

Faculty []

If yes, how many paychecks do you estimate you'll receive in the calendar year?

Flexible Reimbursement Account Information

Health Care Account

Enrollment Change Cancellation

\$ _____
Amount to be deducted for the plan year 2008*

* Minimum amount is \$200/year
Maximum amount is \$4,000/year

Dependent Care Account

Enrollment Change Cancellation

\$ _____
Amount to be deducted for the plan year 2008*

* Not to exceed a maximum of \$5,000 if you are filing taxes as single or married filing jointly or \$2,500 if you are married filing separately.

Acknowledgement/Signature

In making this election, I understand and agree that:

1. I can receive reimbursement only for qualified expenses incurred from date of enrollment through December 31, 2008 or the date I am no longer eligible for reimbursement.
2. Any unused amount remaining in my Flex Health Care and/or Dependent Care Reimbursement Account three months (March 31) after the plan year will be forfeited.
3. If I receive reimbursement for expenses that are not eligible, or if the IRS rules that the Flex Account does not meet the requirement for reducing taxable income, I agree to reimburse the University for any liability it may incur for failure to withhold Federal and State income tax or Social Security tax, up to the amount of additional tax actually owed by me, including interest and penalties.
4. Brandeis University cannot guarantee the tax treatment of Flexible Dependent Care Reimbursement Account deposits as described in the Flexible Dependent Care Reimbursement Account booklet.
5. I cannot change or revoke this agreement during the plan year unless certain changes in my status as described in the Flexible Health Care Reimbursement Account booklet and/or the Flexible Dependent Care Reimbursement Account booklet occur.
6. The Plan Administrator may reduce or cancel my salary reduction agreements if he/she considers it advisable in order to satisfy provisions of the Internal Revenue Code.

I have read, understand, and agree to all provisions of the plan as described in the *Flexible Health Care Reimbursement Account booklet* and/or the *Flexible Dependent Care Reimbursement Account booklet*.

Employee Signature

Date

For Internal Use only

Health FSA: # Paychecks per Year _____ / Total Reductions for 2008 = \$ _____ per pay period

Dependent FSA: # Paychecks per Year _____ / Total Reduction for 2008 = \$ _____ per pay period

Accepted and agreed to by Brandeis University. Your Flexible Spending Account(s) will be effective from
_____ **1, 2008 to December 31, 2008.**

Assist. Vice President for Human Resources

Date