



Finance Office

December 11, 2020

RE: 2021 Retirement Allowance \$3,000

Once a year you receive a retirement allowance to be invested in a Tax Savings Account (TSA) of your choice. For tax deferred purposes, we recommend the funds be sent directly from the Diocese to your Lincoln account or to another 403(b) account.

Lincoln Financial Group is the current 403(b) provider for the Diocese. If you are interested in opening a new account with Lincoln, please contact Mark Ruffo at (619) 346-5591 or Mark.Ruffo@LFG.com

Please confirm or update your TSA preference below for 2021. If you have any questions please contact Diana Noguez at 858-490-8371 or dnoguez@sdatholic.org

Thank you,

Shirley Pajanor
Chief Financial Officer

2021 Retirement Allowance

Please submit your response to Diana Noguez via email at dnoguez@sdatholic.org or fax 858-490-8272 by January 10, 2021.

Please continue the same as last year, send my retirement allowance to _____.

Please send my retirement allowance to my newly opened account at Lincoln Financial Group.

Please send my retirement allowance to: _____
Account Name

My Account number is: _____

Please make the following changes: _____

Full Name

Signature

Date