

STEP 1 - PERSONAL INFORMATION (please print clearly)

NAME: _____ SOCIAL SECURITY NUMBER: _____ - _____ - _____

SCHOOL DISTRICT NAME: _____ SCHOOL DISTRICT PLAN NUMBER: _____

School district name and plan number list is provided at the back of this form.

DATE OF BIRTH: _____

ADDRESS: _____ APT: _____

CITY: _____ STATE: _____ ZIP CODE: _____

PHONE: _____ EMAIL: _____ HIRE DATE: _____

OPTIONAL

STEP 2 - CHOOSE YOUR INVESTMENT STRATEGY

Please refer to the Plan Highlights and Fund Fact Sheets located at **Pension2.com** for additional information about the CalSTRS Pension2 Program, the Easy Choice Portfolios, Voya Fixed Plus III and the mutual fund investment options. The Investment Allocation of Contributions elected below will apply to all contribution sources. Eligibility to receive Employer Contributions under the plan is determined by the Employer. Completion of this Enrollment Form does not establish your eligibility to receive Employer Contributions.

If you do not designate fund elections or elections do not total 100%, your investment allocation will default 100% to the Voya Fixed Plus III¹. Please check only **ONE** of the two options below in this section:

ELECTION A - EASY CHOICE PORTFOLIO

By selecting an Easy Choice Portfolio you are designating 100% of your contributions to that particular portfolio. You also agree to have your elections rebalanced periodically in order to stay within the investment percentages of the portfolio you have chosen. *(The CalSTRS Pension2 Easy Choice Portfolios are created by CalSTRS from the list of investment options below, in conjunction with its Financial Planning Consultant.)*

If you would like to keep things simple, answer two questions.

1. When will you retire: (Check the box that best defines your expected retirement year)

2060+ 2050 2040 2030 RETIRED

2. What type of investor are you: (Check the appropriate box)

CONSERVATIVE MODERATE AGGRESSIVE

OR

ELECTION B - BUILD YOUR OWN PORTFOLIO

If you prefer to choose among investments in different asset classes and develop your own portfolio to match your time horizon and tolerance for assuming risk, consider a "build your own portfolio" strategy. Allocations must equal 100%. If your selection is invalid or unclear, your contributions will be automatically invested for you in the Voya Fixed Plus III¹.

VOYA FIXED PLUS III ¹	_____ .00%	VANGUARD SMALL CAP INDEX	_____ .00%
FEDERATED US TREASURY CASH	_____ .00%	VANGUARD MID CAP INDEX	_____ .00%
VANGUARD TOTAL BOND MARKET	_____ .00%	GMO GLOBAL EQUITY ASSET	_____ .00%
VANGUARD SHORT-TERM BOND INDEX	_____ .00%	VANGUARD EMERGING MARKETS	_____ .00%
VANGUARD INFLATION PROTECTED	_____ .00%	VANGUARD DEVELOPED MARKETS	_____ .00%
VANGUARD TOTAL STOCK MARKET	_____ .00%	DODGE AND COX INTERNATIONAL	_____ .00%
VANGUARD INSTITUTIONAL INDEX PLUS	_____ .00%	DFA INTERNATIONAL SMALL CO	_____ .00%
NORTHERN GLOBAL SUSTAINABILITY INDEX	_____ .00%	ARTISAN INTERNATIONAL	_____ .00%
TIAA-CREF SOCIAL CHOICE EQUITY	_____ .00%	VANGUARD REAL ESTATE INDEX INSTITUTIONAL	_____ .00%
DODGE AND COX STOCK	_____ .00%	PIMCO ALL ASSET	_____ .00%
AMERICAN GROWTH FUND	_____ .00%	Total Percent of Investment Allocation Must Equal	100%

¹Voya Fixed Plus III is offered through a group annuity contract by Voya Retirement Insurance and Annuity Company, P.O. Box 990063, Hartford, CT 06199-0063

STEP 3 - START YOUR CONTRIBUTIONS

A Salary Reduction Agreement must be completed and submitted to your school district or your district's third party administrator to start your contributions to Pension2. Please contact your school district (or, if applicable, your district's third party administrator or **403bcompare.com**) for the appropriate form(s).

I understand that:

An election made on my 457 participation agreement applies only to compensation paid or made available no earlier than the first day of the calendar month after the calendar month in which the participation agreement is signed

By completing this form you are directing CalSTRS to allocate funds to investment options offered by the CalSTRS Pension2 457Program. All of your rights under these funding vehicles are subject to the terms of the CalSTRS Pension2 Program, your school district's 457, and the distribution restrictions under the Internal Revenue Code. CalSTRS may decide to cease offering any of these funding vehicles as allocation options under the plan and, should CalSTRS decide to do so, you may be required to transfer your accumulations in such plan funding option to another funding option.

I have read and acknowledge all provisions to this form. I acknowledge that I have received and reviewed the Plan Highlights and Fund Fact Sheets located at **Pension2.com** which contain additional information about the CalSTRS Pension2 Program, the Easy Choice Portfolios, Voya Fixed Plus III and the mutual fund investment options. I certify under penalty of perjury under the laws of the State of California that the Social Security number provided by me is my correct Social Security number.

PARTICIPANT'S SIGNATURE: _____ **DATE:** ____/____/____

The Information Practices Act of 1977 (Civil Code §1798.17) and the Federal Privacy Act of 1974 (Title 5, United States Code §552a(e)(3), §7 Note) require that this notice be provided when collecting personal information and Social Security numbers from individuals. Information requested on this form is used by CalSTRS, Active Financial Choices for the purposes of identification. Legal references authorizing solicitation and maintenance of this personal information include Education Code Sections 24950 and 24975, Government Code Sections 1151 and 1153, and Title 26, United States Code (Internal Revenue Code) Sections 6011 and 6051. It is mandatory to furnish all information requested on this form. Failure to provide the mandatory information may result in the enrollment action not being processed. Information requested on this form may be shared with the record-keeper, school district and school district's contracted Third Party Administrator in conjunction with guidelines established by the Internal Revenue Service in accordance with 457 plans. Copies of the CalSTRS Pension2 Enrollment Form are maintained in confidential files of CalSTRS' contracted supplemental savings plan administrator for five years. Enrollees have the right of access to their enrollment forms upon request. The agency official responsible for maintenance of the forms is: California State Teachers' Retirement System, P.O. Box 15275 MS-44, Sacramento, CA 95851-0275.

Please submit your completed form to:

FAX DELIVERY:

CalSTRS Pension2 Plan Administration
1-888-814-5862

REGULAR MAIL DELIVERY:

CalSTRS Pension2 Plan Administration
P.O. Box 389
Hartford, CT 06141

OVERNIGHT DELIVERY:

CalSTRS Pension2 Plan Administration
One Orange Way
Windsor, CT 06095

If you have any questions, please contact a Customer Service Associate at (888) 394-2060 or go online at **Pension2.com**. Customer Service Associates are available Monday through Friday, 8:00 A.M. to 5:00 P.M. Pacific Time (excluding stock market holidays).

CaISTRS PENSION2 SCHOOL DISTRICT PLAN NUMBERS

Plan #	School District	Plan #	School District
401807	ALAMEDA COUNTY OFFICE OF EDUCATION	401954	MOJAVE UNIFIED
401970	ALAMEDA UNIFIED SCHOOL DISTRICT	401944	MONROVIA UNIFIED
401869	ALBERT EINSTEIN ACADEMY	401941	MONTEREY PENINSULA COLLEGE
401755	ALPINE COUNTY UNIFIED	401887	MONTEREY COUNTY OFFICE OF EDUCATION
401806	ALVORD UNIFIED	401778	MOORPARK UNIFIED
401737	ANTELOPE ELEMENTARY	401812	MORGAN HILL UNIFIED SCHOOL DISTRICT
401966	ANTELOPE VALLEY UNION HIGH	401751	MOTHER LODE UNION ELEMENTARY
401765	ARTS IN ACTION COMMUNITY CHARTER	401917	MOUNTAIN VIEW WHISMAN
401925	BAYSHORE SCHOOL DISTRICT	401848	MT. DIABLO UNIFIED
401754	BELLFLOWER UNIFIED	401796	NEVADA COUNTY CHARTER AUTHORITY
401988	BIG LAGOON UNION SD	401757	NEVADA JOINT UNION HIGH SD
401744	BLACK OAK MINE UNIFIED	401951	NEWCASTLE ELEMENTARY
401992	BRIDGES CHARTER SCHOOL	401991	NORTH COW CREEK
401747	BUCKEYE UNION ELEMENTARY	401777	NORTH OAKLAND COMMUNITY CHARTER
401922	CABRILLO COMMUNITY COLLEGE DISTRICT	401797	NOVATO UNIFIED SCHOOL DISTRICT
401959	CAMPBELL UNION HIGH SCHOOL DISTRICT	401914	OAK GROVE SCHOOL DISTRICT
401938	CENTER JOINT UNIFIED	401884	OJAI UNIFIED
401977	CERRITOS COMMUNITY COLLEGE DISTRICT	401964	PACHECO UNION ELEMENTARY
402004	CHABOT-LAS POSITAS COMMUNITY COLLEGE DISTRICT	401962	PACIFIC GROVE UNIFIED
401918	CHICO USD	401986	PACIFIC VIEW CHARTER SCHOOL
401846	CHAFFEY COMMUNITY COLLEGE DISTRICT	401913	PALO ALTO UNIFIED
401810	CUESTA COMMUNITY COLLEGE DISTRICT	401943	PALOS VERDES PENINSULA UNIFIED
401761	CONTRA COSTA COMMUNITY COLLEGE DISTRICT	401779	PARAMOUNT ACADEMY
401875	DOWNTOWN COLLEGE PREP	402009	PERALTA COMMUNITY COLLEGE DISTRICT
402000	EAST UNION HIGH SD	401902	PASADENA ROSEBUD ACADEMY CHARTER SCHOOL
401746	EL DORADO COUNTY OFFICE OF EDUCATION	401749	PLACERVILLE UNION ELEMENTARY
401745	EL DORADO UNION HIGH	401967	PLEASANT VALLEY SCHOOL DISTRICT
401987	EUREKA CITY USD	401750	POLLOCK PINES ELEMENTARY
401794	FRANKLIN-MCKINLEY UNIFIED	401870	REDDING SCHOOL DISTRICT
401803	FOOTHILL DE ANZA COMMUNITY COLLEGE DISTRICT	401772	RIVER CHARTER SCHOOLS
401920	FEATHER RIVER CCD	401738	RIVERSIDE COMMUNITY COLLEGE DISTRICT
401972	FOLSOM-CORDOVA UNIFIED	401847	ROSEVILLE JOINT UNION HIGH
401989	FORTUNA UNION ELEMENTARY SD	402015	SALINAS UNION HIGH
401990	FORTUNA UNION HIGH SD	401903	SAN FRANCISCO UNIFIED
402008	FREMONT UNION HIGH SD	401756	SAN JACINTO UNIFIED
401104	FULLERTON JOINT UNION HIGH	401893	SAN JOSE UNIFIED
401901	GALT JOINT UNION HIGH SD	401785	SAN LUIS COASTAL UNIFIED
401995	GILROY UNIFIED	401916	SANTA BARBARA USD
401743	GOLD OAK UNION ELEMENTARY	401996	SANTA MARIA-BONITA
401742	GOLD TRAIL UNION ELEMENTARY	401678	SANTA MONICA COMMUNITY COLLEGE DISTRICT
402008	GONZALES UNIFIED	401985	SANTA PAULA USD
401802	HAPPY VALLEY ELEMENTARY	401979	SARATOGA UNION ELEMENTARY
401929	HAPPY VALLEY UNION ESD (ANDERSON, CA)	401969	SHASTA COUNTY OFFICE OF EDUCATION
401767	HUMBOLDT COUNTY OFFICE OF EDUCATION	401768	SHASTA UNION HIGH
401773	ICEF CHARTER ACADEMY	401924	SIERRA JOINT COMMUNITY COLLEGE DISTRICT
401961	IMPERIAL COUNTY OFFICE OF EDUCATION	401776	SILVER OAK HIGH MONTESSORI CHARTER
401947	INTEGRITY CHARTER SCHOOL	401994	SOLANO COUNTY OFFICE OF ED
401963	JAMESTOWN SCHOOL DISTRICT	401926	SONOMA VALLEY UNIFIED
402016	KERN UNION HIGH	401978	STOCKTON UNIFIED
401739	LAFAYETTE ELEMENTARY	401982	SUNNYVALE SCHOOL DISTRICT
401748	LAKE TAHOE COMMUNITY COLLEGE DISTRICT	401852	TAHOE-TRUCKEE UNIFIED
401786	LATROBE ELEMENTARY	401952	TEMPLE CITY UNIFIED
401759	LODI UNIFIED	401793	TWIN RIVERS UNIFIED
401758	LONE PINE UNIFIED	401957	URBAN DISCOVERY ACADEMY
401677	LOS ANGELES COMMUNITY COLLEGE DISTRICT	401868	VENTURA COMMUNITY COLLEGE DISTRICT
401762	LOS RIOS COMMUNITY COLLEGE DISTRICT	401980	VISIONS IN EDUCATION
401872	LUTHER BURBANK	401973	WOODSIDE ELEMENTARY
401894	MARIN CCD	401753	YOSEMITE COMMUNITY COLLEGE DISTRICT
401795	MARYSVILLE JOINT UNIFIED	401880	YUBA CITY UNIFIED
401971	MERCED COE		
401908	MILPITAS UNIFIED		
401937	MODESTO CITY SCHOOLS		