

**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: \_\_\_\_\_ E-MAIL: \_\_\_\_\_ 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 III<sup>1</sup>. 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)**
- 2050+       2040       2030       2020       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 III<sup>1</sup>.

VOYA FIXED PLUS III <sup>1</sup>	_____ .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%	<b>Total Percent of Investment Allocation Must Equal</b>	<b>100%</b>

<sup>1</sup>Voya 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**

You must complete and submit this enrollment form prior to completing your school district's Salary Reduction Agreement. Please contact your school district, Third Party Administrator or 403bcompare.com for your Salary Reduction Agreement.

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 24747  
Jacksonville, FL 32241-4747

**OVERNIGHT DELIVERY:**

CalSTRS Pension2 Plan Administration  
8900 Prominence Parkway  
Jacksonville, FL 32256

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	401914	OAK GROVE SCHOOL DISTRICT
401869	ALBERT EINSTEIN ACADEMY	401884	OJAI UNIFIED
401755	ALPINE COUNTY UNIFIED	401913	PALO ALTO UNIFIED
401806	ALVORD UNIFIED	401943	PALOS VERDES PENINSULA UNIFIED
401737	ANTELOPE ELEMENTARY	401779	PARAMOUNT ACADEMY
401765	ARTS IN ACTION COMMUNITY CHARTER	401902	PASADENA ROSEBUD ACADEMY CHARTER SCHOOL
401925	BAYSHORE SCHOOL DISTRICT	401749	PLACERVILLE UNION ELEMENTARY
401754	BELLFLOWER UNIFIED	401750	POLLOCK PINES ELEMENTARY
401744	BLACK OAK MINE UNIFIED	401870	REDDING SCHOOL DISTRICT
401747	BUCKEYE UNION ELEMENTARY	401772	RIVER CHARTER SCHOOLS
401922	CABRILLO COMMUNITY COLLEGE DISTRICT	401738	RIVERSIDE COMMUNITY COLLEGE DISTRICT
401938	CENTER JOINT UNIFIED	401847	ROSEVILLE JOINT UNION HIGH
401918	CHICO UDS	401903	SAN FRANCISCO UNIFIED
401846	CHAFFEY COMMUNITY COLLEGE DISTRICT	401756	SAN JACINTO UNIFIED
401810	CUESTA COMMUNITY COLLEGE DISTRICT	401893	SAN JOSE UNIFIED
401761	CONTRA COSTA COMMUNITY COLLEGE DISTRICT	401785	SAN LUIS COASTAL UNIFIED
401801	DINUBA UNIFIED	401916	SANTA BARBARA USD
401875	DOWNTOWN COLLEGE PREP	401678	SANTA MONICA COMMUNITY COLLEGE DISTRICT
401746	EL DORADO COUNTY OFFICE OF EDUCATION	401768	SHASTA UNION HIGH
401745	EL DORADO UNION HIGH	401924	SIERRA JOINT COMMUNITY COLLEGE DISTRICT
401794	FRANKLIN-MCKINLEY UNIFIED	401776	SILVER OAK HIGH MONTESSORI CHARTER
401803	FOOTHILL DE ANZA COMMUNITY COLLEGE DISTRICT	401926	SONOMA VALLEY UNIFIED
401920	FEATHER RIVER CCD	401852	TAHOE-TRUCKEE UNIFIED
401104	FULLERTON JOINT UNION HIGH	401952	TEMPLE CITY UNIFIED
401901	GALT JOINT UNION HIGH SD	401793	TWIN RIVERS UNIFIED
401743	GOLD OAK UNION ELEMENTARY	401752	UNITY SCHOOLS
401742	GOLD TRAIL UNION ELEMENTARY	401957	URBAN DISCOVERY ACADEMY
401802	HAPPY VALLEY ELEMENTARY	401868	VENTURA COMMUNITY COLLEGE DISTRICT
401929	HAPPY VALLEY UNION ESD (ANDERSON, CA)	401753	YOSEMITE COMMUNITY COLLEGE DISTRICT
401767	HUMBOLDT COUNTY OFFICE OF EDUCATION	401880	YUBA CITY UNIFIED
401773	ICEF CHARTER ACADEMY		
401947	INTEGRITY CHARTER SCHOOL		
401739	LAFAYETTE ELEMENTARY		
401748	LAKE TAHOE COMMUNITY COLLEGE DISTRICT		
401786	LATROBE ELEMENTARY		
401759	LODI UNIFIED		
401758	LONE PINE UNIFIED		
401677	LOS ANGELES COMMUNITY COLLEGE DISTRICT		
401762	LOS RIOS COMMUNITY COLLEGE DISTRICT		
401872	LUTHER BURBANK		
401894	MARIN CCD		
401795	MARYSVILLE JOINT UNIFIED		
401908	MILPITAS UNIFIED		
401937	MODESTO CITY SCHOOLS		
401954	MOJAVE UNIFIED		
401944	MONROVIA UNIFIED		
401941	MONTEREY PENINSULA COLLEGE		
401887	MONTEREY COUNTY OFFICE OF EDUCATION		
401778	MOORPARK UNIFIED		
401812	MORGAN HILL UNIFIED SCHOOL DISTRICT		
401751	MOTHER LODE UNION ELEMENTARY		
401917	MOUNTAIN VIEW WHISMAN		
401848	MT. DIABLO UNIFIED		
401796	NEVADA COUNTY CHARTER SERVICES AUTHORITY		
401951	NEWCASTLE ELEMENTARY		
401777	NORTH OAKLAND COMMUNITY CHARTER		
401797	NOVATO UNIFIED SCHOOL DISTRICT		