

**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: \_\_\_\_\_ PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ APT: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**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)**

- 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 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 - 403(b) SALARY REDUCTION ELECTION**

I hereby authorize my employer to reduce my compensation (as defined in the 403(b) plan (the Plan)) by the amounts below and to apply such amount each pay period toward the purchase of the funding vehicle(s) offered by CalSTRS Pension2. I understand that this election applies only to compensation paid or made available after the date that this Agreement is signed. I further understand that this Agreement is irrevocable with respect to compensation paid and shall supersede any prior Agreement between my employer and me under the Plan.

- Pre-Tax Deferral \$ \_\_\_\_\_ (per pay period)  
 Roth 403(b) Contribution\*\* \$ \_\_\_\_\_ (per pay period)

\*\*Roth Contributions are available only if permitted under the Plan Document.

**STEP 4 - PARTICIPANT AUTHORIZATION**

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

I understand that:

An election made on my 403(b) salary reduction agreement applies only to compensation paid or made available after the date that the 403(b) salary reduction agreement is signed.

By completing this form you are directing CalSTRS to allocate funds to investment options offered by the CalSTRS Pension2 403(b) Program. All of your rights under these funding vehicles are subject to the terms of the CalSTRS Pension2 Program, your school district's 403(b) plan, 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 403(b) 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 ALLOWS ROTH)**

401788 ACADEMY OF THE REDWOODS*	401230 HOPE ELEMENTARY (TULARE COUNTY)*	401950 SCHOLARSHIP PREP*
400399 ANTELOPE VALLEY CCD	401231 HORICON ELEMENTARY*	401575 SEBASTOPOL UNION ELEMENTARY*
400315 ANTIPOCH UNIFIED	401233 HOT SPRINGS ELEMENTARY	400852 SEQUOIA UNION ELEMENTARY
401997 ALDER GROVE CHARTER SCHOOL*	401245 INDIAN DIGGINGS ELEMENTARY*	401589 SHERMAN THOMAS CHARTER
400950 ALLENSWORTH ELEMENTARY	401865 INSIGHT @ LOS ANGELES	401597 SILVER FORK ELEMENTARY*
400951 ALPAUGH UNIFIED	401866 INSIGHT @ SAN DIEGO	400828 SONOMA COUNTY OFFICE OF EDUCATION*
400952 ALPINE COUNTY OFFICE OF EDUCATION*	401910 IQ ACADEMY CALIFORNIA- LA*	400910 SOUTH PASADENA UNIFIED*
400293 ALPINE COUNTY UNIFIED	401249 ISLAND UNION ELEMENTARY	401620 SPRINGVILLE UNION ELEMENTARY
400953 ALTA VISTA SCHOOL DISTRICT	401998 IVY BOUND ACADEMY	400341 STATE CENTER COMMUNITY COLLEGE DISTRICT
400956 ALVIEW-DAIRYLAND UNION ELEMENTARY	401867 KAVOD ELEMENTARY CHARTER	401625 STONE CORRAL ELEMENTARY
400943 ANDERSON VALLEY UNIFIED	401269 KINGS COUNTY OFFICE OF EDUCATION	401626 STONY CREEK JOINT UNIFIED
400964 ARENA UNION ELEMENTARY	400909 KINGS RIVER UNION ELEMENTARY	401627 STRATHMORE UNION ELEMENTARY*
400388 ARMONA UNION ELEMENTARY	401271 KINGS RIVER-HARDWICK UNION ELEMENTARY*	401633 SUNDALE UNION ELEMENTARY
400966 ARVIN UNION ELEMENTARY	401274 KIT CARSON UNION ELEMENTARY*	401634 SUNNYSIDE UNION ELEMENTARY
400735 BALLARD ELEMENTARY*	401279 LA VIDA INDEPENDENT STUDY CHARTER	401818 SYCAMORE VALLEY ACADEMY
400978 BASS LAKE JOINT ELEMENTARY	401730 LAKE ELEMENTARY*	401647 TERRA BELLA UNION ELEMENTARY
401911 BAYPOINT PREPARATORY ACADEMY	400329 LAKE TAHOE COMMUNITY COLLEGE DISTRICT*	401649 THREE RIVERS UNION ELEMENTARY
401787 BAYSHORE PREP CHARTER*	400324 LAKE TAHOE UNIFIED*	401650 TIPTON ELEMENTARY
400325 BLACK OAK MINE UNIFIED*	401288 LAKESIDE UNION ELEMENTARY (KINGS COUNTY)*	401655 TRAVER JOINT ELEMENTARY
401006 BRET HARTE UNION HIGH*	401299 LATROBE ELEMENTARY*	401664 TULARE CITY SCHOOL DISTRICT*
401013 BUENA VISTA ELEMENTARY*	401877 LEARNER CENTER SCHOOL*	401665 TULARE COUNTY DEPT OF ED CHILD CARE DIVISION
400945 BURTON ELEMENTARY	401164 LEARNING CHOICE ACADEMY*	400854 TULARE COUNTY OFFICE OF EDUCATION*
400303 CALAVERAS COUNTY OFFICE OF EDUCATION*	401906 LEARNING FOR LIFE CHARTER SCHOOL*	400855 TULARE JOINT UNION HIGH
401023 CALAVERAS UNIFIED*	401305 LEGGETT VALLEY UNIFIED	400544 TWIN RIDGES ELEMENTARY*
401029 CALIFORNIA MONTESSORI PROJECT*	401307 LEMOORE UNION ELEMENTARY	400505 UKIAH UNIFIED*
401003 CALIFORNIA STATE CONTROLLERS OFFICE	401308 LEMOORE UNION HIGH	401431 UNITY SCHOOLS
401855 CALIFORNIA VIRTUAL ACADEMY - FRESNO	401311 LIBERTY ELEMENTARY (SONOMA COUNTY)	401983 UNIVERSITY HIGH SCHOOL
401856 CALIFORNIA VIRTUAL ACADEMY - JAMESTOWN	401898 LIFE SOURCE INT'L CHARTER*	401791 URBAN CORPS CHARTER SCHOOL OF SAN DIEGO*
401857 CALIFORNIA VIRTUAL ACADEMY - KINGS	400851 LINDSAY UNIFIED	400302 VALLECITO UNION (CALAVERAS COUNTY)*
401858 CALIFORNIA VIRTUAL ACADEMY - LOS ANGELES	401319 LIVE OAK CHARTER*	401817 VALLEY LIFE CHARTER SCHOOLS
401859 CALIFORNIA VIRTUAL ACADEMY - MARICOPA	400878 LOS ANGELES COMMUNITY COLLEGE DISTRICT*	402002 VINCENT ACADEMY*
401860 CALIFORNIA VIRTUAL ACADEMY - MARICOPA HS	401331 LOS OLIVOS ELEMENTARY*	400853 VISALIA UNIFIED*
400812 CALIFORNIA VIRTUAL ACADEMY - SAN DIEGO	400393 LUCERNE ELEMENTARY	402011 VISTA OAKS CHARTER*
401861 CALIFORNIA VIRTUAL ACADEMY - SAN JOAQUIN	400488 MADERA COUNTY OFFICE OF EDUCATION	401698 WAUKENA JOINT UNION ELEMENTARY
401862 CALIFORNIA VIRTUAL ACADEMY - SAN MATEO	400487 MADERA UNIFIED*	400821 WEST SONOMA UNION HIGH
401863 CALIFORNIA VIRTUAL ACADEMY - SONOMA	401338 MAGNOLIA UNION ELEMENTARY (IMPERIAL COUNTY)	401792 WESTERN SIERRA CHARTER*
401864 CALIFORNIA VIRTUAL ACADEMY - SUTTER	400514 MAMMOTH UNIFIED	400502 WILLITS UNIFIED*
401033 CAMINO UNION ELEMENTARY*	401339 MANCHESTER UNION ELEMENTARY	400343 WILLOWS UNIFIED*
401808 CAMPTONVILLE ACADEMY*	401349 MARK TWAIN UNION ELEMENTARY*	401719 WOODLAKE UNION ELEMENTARY*
401040 CAPAY JOINT UNION ELEMENTARY*	400498 MENDOCINO COUNTY OFFICE OF EDUCATION	401722 WOODVILLE UNION ELEMENTARY
401044 CARPINTERIA UNIFIED	400500 MENDOCINO UNIFIED	401882 YU MING CHARTER SCHOOL
401815 CEIBA PUBLIC SCHOOLS*	400503 MENDOCINO-LAKE COMMUNITY COLLEGE DISTRICT*	
401055 CENTRAL UNION ELEMENTARY	401968 M.I.T ACADEMY	
401064 CHOWCHILLA ELEMENTARY	401377 MONO COUNTY OFFICE OF EDUCATION	
401068 CITRUS SOUTH TULE ELEMENTARY	401381 MONSON-SULTANA JOINT UNION ELEMENTARY*	
400879 CITY COLLEGE OF SAN FRANCISCO*	401912 MONTEREY BAY CHARTER SCHOOL*	
401071 CLEAR CREEK ELEMENTARY*	401389 MOTHER LODGE UNION ELEMENTARY*	
401072 CLOVERDALE UNIFIED*	401897 NATOMAS CHARTER SCHOOL*	
400736 COLD SPRING ELEMENTARY	400613 NATOMAS UNIFIED*	
400946 COLLEGE OF THE SEQUOIAS	401935 NEW ACADEMY CANOGA PARK	
401083 COLUMBINE ELEMENTARY	401427 OAK VALLEY UNION ELEMENTARY	
401958 COMMUNITY LEARNING CENTER SCHOOL*	401430 OAKLAND MILITARY INSTITUTE*	
401981 CORE CHARTER SCHOOL	401179 OAKLAND SCHOOL FOR THE ARTS	
401934 CORE PLACER*	400286 OAKLAND UNIFIED*	
400389 CORCORAN JOINT UNIFIED	401437 OLD ADOBE UNION ELEMENTARY*	
401885 CONTRA COSTA SCHOOL OF PERFORMING ARTS*	400342 ORLAND JOINT UNIFIED*	
401915 CREDO HIGH SCHOOL*	401447 OUTSIDE CREEK ELEMENTARY	
401100 CUTLER-OROSI JOINT UNIFIED	401790 PENN VALLEY UNION ELEMENTARY*	
401116 DINUBA UNIFIED	400824 PETALUMA CITY SCHOOLS	
401816 DIXON MONTESSORI CHARTER SCHOOL	401473 PIONEER UNION ELEMENTARY (EL DORADO COUNTY)*	
401124 DUCOR UNION ELEMENTARY	401474 PIONEER UNION ELEMENTARY (KINGS COUNTY)*	
401878 EAGLE PEAK MONTESSORI SCHOOL*	400898 PIXLEY UNION HIGH	
400849 EARLIMART ELEMENTARY*	400326 PLACERVILLE UNION ELEMENTARY*	
401132 EASTERN SIERRA UNIFIED	401478 PLAZA ELEMENTARY*	
401789 EDISON-BETHUNE CHARTER ACADEMY*	401483 PLEASANT VIEW ELEMENTARY	
401735 EEL RIVER CHARTER	401490 POINT ARENA JOINT UNION HIGH	
400888 EL DORADO COUNTY OFFICE OF EDUCATION*	401491 POLLOCK PINES ELEMENTARY*	
400328 EL DORADO UNION HIGH*	400856 PORTERVILLE UNIFIED*	
401140 ELEANOR ROOSEVELT COMMUNITY LEARNING CENTER*	400504 POTTER VALLEY COMMUNITY UNIFIED*	
400619 ELK GROVE UNIFIED*	401498 PRINCETON JOINT UNIFIED*	
400934 EXETER UNION HIGH	401504 RAYMOND-KNOWLES UNION ELEMENTARY	
400850 FARMERSVILLE UNIFIED*	401505 READY SPRINGS UNION ELEMENTARY*	
400499 FORT BRAGG UNIFIED*	401873 REALM CHARTER SCHOOL*	
401175 FORT ROSS ELEMENTARY*	401507 REDWOOD ACADEMY OF UKIAH	
400281 FREMONT UNIFIED*	401510 REEF-SUNSET UNIFIED	
400428 GLENDALE UNIFIED*	400327 RESCUE UNION ELEMENTARY*	
401192 GLENN COUNTY OFFICE OF EDUCATION*	401513 RICHGROVE ELEMENTARY	
401194 GOLD OAK UNION ELEMENTARY *	401732 RIVER OAK CHARTER	
401196 GOLD TRAIL UNION ELEMENTARY *	400589 RIVERSIDE COMMUNITY COLLEGE DISTRICT	
401153 GOLDEN EAGLE CHARTER*	401529 ROCKFORD ELEMENTARY	
400927 GOLDEN PLAINS UNIFIED	401900 ROCKY POINT CHARTER SCHOOL	
400737 GOLETA UNION ELEMENTARY	400501 ROUND VALLEY UNIFIED*	
400810 GUERNEVILLE ELEMENTARY*	400677 SAN DIEGUITO UNION HIGH SCHOOL*	
401213 HAMILTON UNION ELEMENTARY*	400290 SAN LORENZO UNIFIED	
401215 HANFORD ELEMENTARY	400825 SANTA ROSA CITY SCHOOLS	
400882 HANFORD JOINT UNION HIGH	401570 SAUCELITO ELEMENTARY	
401262 HIGH TECH LA CHARTER*		
401805 HIGHLANDS COMMUNITY CHARTER SCHOOL*		
401229 HOPE ELEMENTARY (SANTA BARBARA COUNTY)*	Plan # School District	