

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

**INVESTMENT ALLOCATION OF CONTRIBUTIONS**

Please refer to the Plan Highlights and Fund Fact Sheets located at [Pension2.com](http://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	_____ .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%
TIAA-CREF SOCIAL CHOICE EQUITY	_____ .00%	ARTISAN INTERNATIONAL	_____ .00%
DODGE AND COX STOCK	_____ .00%	VANGUARD REAL ESTATE INDEX INSTITUTIONAL	_____ .00%
AMERICAN GROWTH FUND	_____ .00%	PIMCO ALL ASSET	_____ .00%

**Total Percent of Investment Allocation Must Equal 100%**

<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

### 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.

### 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 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 ALLOWS ROTH)**

Plan #	School District	Plan #	School District	Plan #	School District
401788	ACADEMY OF THE REDWOODS*	400909	KINGS RIVER UNION ELEMENTARY	401665	TULARE COUNTY DEPT OF ED CHILD CARE DIVISION
400950	ALLENSTWORTH ELEMENTARY	401279	LA VIDA INDEPENDENT STUDY CHARTER	400854	TULARE COUNTY OFFICE OF EDUCATION*
400951	ALPAUGH UNIFIED	401730	LAKE ELEMENTARY*	400855	TULARE JOINT UNION HIGH
400952	ALPINE COUNTY OFFICE OF EDUCATION*	400329	LAKE TAHOE COMMUNITY COLLEGE DISTRICT*	400544	TWIN RIDGES ELEMENTARY*
400293	ALPINE COUNTY UNIFIED	400324	LAKE TAHOE UNIFIED*	400505	UKIAH UNIFIED*
400953	ALTA VISTA SCHOOL DISTRICT	401299	LATROBE ELEMENTARY*	401791	URBAN CORPS CHARTER SCHOOL OF SAN DIEGO*
400956	ALVIEW-DAIRYLAND UNION ELEMENTARY	401300	LAYTONVILLE UNIFIED	400302	VALLECITO UNION (CALAVERAS COUNTY)*
400943	ANDERSON VALLEY UNIFIED	401877	LEARNER CENTER SCHOOL*	401817	VALLEY LIFE CHARTER SCHOOLS
400964	ARENA UNION ELEMENTARY	401164	LEARNING CHOICE ACADEMY*	400853	VISALIA UNIFIED*
400966	ARVIN UNION ELEMENTARY	401906	LEARNING FOR LIFE CHARTER SCHOOL*	401698	WAUKENA JOINT UNION ELEMENTARY
400735	BALLARD ELEMENTARY*	401305	LEGGETT VALLEY UNIFIED	400821	WEST SONOMA UNION HIGH
400978	BASS LAKE JOINT ELEMENTARY	401308	LEMOORE UNION HIGH	401792	WESTERN SIERRA CHARTER*
401911	BAYPOINT PREPARATORY ACADEMY	401311	LIBERTY ELEMENTARY (SONOMA COUNTY)	400502	WILLITS UNIFIED*
401787	BAYSHORE PREP CHARTER*	401898	LIFE SOURCE INT'L CHARTER*	400343	WILLOWS UNIFIED*
400325	BLACK OAK MINE UNIFIED*	400851	LINDSAY UNIFIED	401719	WOODLAKE UNION ELEMENTARY*
401006	BRET HARTE UNION HIGH*	400878	LOS ANGELES COMMUNITY COLLEGE DISTRICT*	401722	WOODVILLE UNION ELEMENTARY
401013	BUENA VISTA ELEMENTARY*	401331	LOS OLIVOS ELEMENTARY*	401882	YU MING CHARTER SCHOOL
400945	BURTON ELEMENTARY	400393	LUCERNE ELEMENTARY		
400303	CALAVERAS COUNTY OFFICE OF EDUCATION*	400488	MADERA COUNTY OFFICE OF EDUCATION		
401023	CALAVERAS UNIFIED*	400487	MADERA UNIFIED*		
401003	CALIFORNIA STATE CONTROLLERS OFFICE	401338	MAGNOLIA UNION ELEMENTARY (IMPERIAL COUNTY)		
401855	CALIFORNIA VIRTUAL ACADEMY - FRESNO	400514	MAMMOTH UNIFIED		
401856	CALIFORNIA VIRTUAL ACADEMY - JAMESTOWN	401339	MANCHESTER UNION ELEMENTARY		
401857	CALIFORNIA VIRTUAL ACADEMY - KINGS	401349	MARK TWAIN UNION ELEMENTARY*		
401858	CALIFORNIA VIRTUAL ACADEMY - LOS ANGELES	400498	MENDOCINO COUNTY OFFICE OF EDUCATION		
401859	CALIFORNIA VIRTUAL ACADEMY - MARICOPA	400500	MENDOCINO UNIFIED		
401860	CALIFORNIA VIRTUAL ACADEMY - MARICOPA HS	400503	MENDOCINO-LAKE COMMUNITY COLLEGE DISTRICT*		
400812	CALIFORNIA VIRTUAL ACADEMY - SAN DIEGO	401377	MONO COUNTY OFFICE OF EDUCATION		
400861	CALIFORNIA VIRTUAL ACADEMY - DAN JOAQUIN	401381	MONSON-SULTANA JOINT UNION ELEMENTARY*		
401862	CALIFORNIA VIRTUAL ACADEMY - SAN MATEO	401912	MONTEREY BAY CHARTER SCHOOL*		
401863	CALIFORNIA VIRTUAL ACADEMY - SONOMA	401389	MOTHER LODE UNION ELEMENTARY*		
401864	CALIFORNIA VIRTUAL ACADEMY - SUTTER	401897	NATOMAS CHARTER SCHOOL*		
401033	CAMINO UNION ELEMENTARY*	400613	NATOMAS UNIFIED*		
401808	CAMPTONVILLE ACADEMY*	401427	OAK VALLEY UNION ELEMENTARY		
401040	CAPAY JOINT UNION ELEMENTARY*	401430	OAKLAND MILITARY INSTITUTE*		
401044	CARPINTERIA UNIFIED	401179	OAKLAND SCHOOL FOR THE ARTS		
401055	CENTRAL UNION ELEMENTARY	400286	OAKLAND UNIFIED*		
401061	CHAWANAKKE JOINT ELEMENTARY SCHO	401437	OLD ADOBE UNION ELEMENTARY*		
401064	CHOWCHILLA ELEMENTARY	400342	ORLAND JOINT UNIFIED*		
401068	CITRUS SOUTH TULE ELEMENTARY	401447	OUTSIDE CREEK ELEMENTARY		
401071	CLEAR CREEK ELEMENTARY*	401457	PALO VERDE UNIFIED		
400736	COLD SPRING ELEMENTARY	401790	PENN VALLEY UNION ELEMENTARY*		
400946	COLLEGE OF THE SEQUOIAS	400824	PETALUMA CITY SCHOOLS		
401083	COLUMBINE ELEMENTARY	401473	PIONEER UNION ELEMENTARY (EL DORADO COUNTY)*		
400389	CORCORAN JOINT UNIFIED	400898	PIXLEY UNION HIGH		
401885	CONTRA COSTA SCHOOL OF PERFORMING ARTS*	400326	PLACERVILLE UNION ELEMENTARY*		
401915	CREDO HIGH SCHOOL*	401478	PLAZA ELEMENTARY*		
401100	CUTLER-OROSI JOINT UNIFIED	401483	PLEASANT VIEW ELEMENTARY		
401116	DINUBA UNIFIED	401490	POINT ARENA JOINT UNION HIGH		
401816	DIXON MONTESSORI CHARTER SCHOOL	401491	POLLOCK PINES ELEMENTARY*		
401124	DUCOR UNION ELEMENTARY	400856	PORTERVILLE UNIFIED*		
401878	EAGLE PEAK MONTESSORI SCHOOL*	400504	POTTER VALLEY COMMUNITY UNIFIED*		
400849	EARLMART ELEMENTARY*	401498	PRINCETON JOINT UNIFIED*		
401132	EASTERN SIERRA UNIFIED	401504	RAYMOND-KNOWLES UNION ELEMENTARY		
401789	EDISON-BETHUNE CHARTER ACADEMY*	401505	READY SPRINGS UNION ELEMENTARY*		
401735	EEL RIVER CHARTER	401793	REALM CHARTER SCHOOL*		
400888	EL DORADO COUNTY OFFICE OF EDUCATION*	401507	REDWOOD ACADEMY OF UKIAH		
400328	EL DORADO UNION HIGH*	400327	RESCUE UNION ELEMENTARY*		
401140	ELEANOR ROOSEVELT COMMUNITY LEARNING CENTER*	401513	RICHGROVE ELEMENTARY		
400619	ELK GROVE UNIFIED*	401732	RIVER OAK CHARTER		
400934	EXETER UNION HIGH	400589	RIVERSIDE COMMUNITY COLLEGE DISTRICT*		
400850	FARMERSVILLE UNIFIED*	401529	ROCKFORD ELEMENTARY		
400499	FORT BRAGG UNIFIED*	401900	ROCKY POINT CHARTER SCHOOL		
401175	FORT ROSS ELEMENTARY*	400501	ROUND VALLEY UNIFIED*		
400281	FREMONT UNIFIED*	400677	SAN DIEGUITO UNION HIGH SCHOOL*		
400560	FULLERTON JOINT UNION HIGH*	400290	SAN LORENZO UNIFIED		
401854	GABRIELLA CHARTER	401560	SANTA BARBARA UNIFIED*		
400428	GLENDALE UNIFIED*	400825	SANTA ROSA CITY SCHOOLS		
401192	GLENN COUNTY OFFICE OF EDUCATION*	401570	SAUCELITO ELEMENTARY		
401194	GOLD OAK UNION ELEMENTARY *	401575	SEBASTOPOL UNION ELEMENTARY*		
401196	GOLD TRAIL UNION ELEMENTARY *	400852	SEQUOIA UNION ELEMENTARY		
401153	GOLDEN EAGLE CHARTER*	401589	SHERMAN THOMAS CHARTER		
400737	GOLETA UNION ELEMENTARY	401597	SILVER FORK ELEMENTARY*		
400810	GUERNEVILLE ELEMENTARY*	400828	SONOMA COUNTY OFFICE OF EDUCATION*		
401213	HAMILTON UNION ELEMENTARY*	400910	SOUTH PASADENA UNIFIED*		
401215	HANFORD ELEMENTARY	401620	SPRINGVILLE UNION ELEMENTARY		
400882	HANFORD JOINT UNION HIGH	400341	STATE CENTER COMMUNITY COLLEGE DISTRICT		
401262	HIGH TECH LA CHARTER*	401625	STONE CORRAL ELEMENTARY		
401229	HOPE ELEMENTARY (SANTA BARBARA COUNTY)*	401626	STONY CREEK JOINT UNIFIED		
401230	HOPE ELEMENTARY (TULARE COUNTY)*	401627	STRATHMORE UNION ELEMENTARY*		
401231	HORICON ELEMENTARY*	401633	SUNDALE UNION ELEMENTARY		
401233	HOT SPRINGS ELEMENTARY	401634	SUNNYSIDE UNION ELEMENTARY		
401245	INDIAN DIGGINGS ELEMENTARY*	401818	SYCAMORE VALLEY ACADEMY		
401865	INSIGHT @ LOS ANGELES	401647	TERRA BELLA UNION ELEMENTARY		
401866	INSIGHT @ SAN DIEGO	401649	THREE RIVERS UNION ELEMENTARY		
401910	IQ ACADEMY CALIFORNIA- LA*	401650	TIPTON ELEMENTARY		
401867	KAVOD ELEMENTARY CHARTER	401655	TRAVER JOINT ELEMENTARY		
400382	KERN COMMUNITY COLLEGE DISTRICT	401664	TULARE CITY SCHOOL DISTRICT*		
400378	KERN UNION HIGH*				