

**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

**INVESTMENT ALLOCATION OF CONTRIBUTIONS**

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>.

<b>VOYA FIXED PLUS III<sup>1</sup></b>	_____ .00%	<b>VANGUARD SMALL CAP INDEX</b>	_____ .00%
<b>FEDERATED US TREASURY CASH</b>	_____ .00%	<b>VANGUARD MID CAP INDEX</b>	_____ .00%
<b>VANGUARD TOTAL BOND MARKET</b>	_____ .00%	<b>GMO GLOBAL EQUITY ASSET</b>	_____ .00%
<b>VANGUARD SHORT-TERM BOND INDEX</b>	_____ .00%	<b>VANGUARD EMERGING MARKETS</b>	_____ .00%
<b>VANGUARD INFLATION PROTECTED</b>	_____ .00%	<b>VANGUARD DEVELOPED MARKETS</b>	_____ .00%
<b>VANGUARD TOTAL STOCK MARKET</b>	_____ .00%	<b>DODGE AND COX INTERNATIONAL</b>	_____ .00%
<b>VANGUARD INSTITUTIONAL INDEX</b>	_____ .00%	<b>DFA INTERNATIONAL SMALL CO</b>	_____ .00%
<b>TIAA-CREF SOCIAL CHOICE EQUITY</b>	_____ .00%	<b>ARTISAN INTERNATIONAL</b>	_____ .00%
<b>DODGE AND COX STOCK</b>	_____ .00%	<b>VANGUARD REIT INDEX</b>	_____ .00%
<b>AMERICAN GROWTH FUND</b>	_____ .00%	<b>PIMCO ALL ASSET</b>	_____ .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

**PARTICIPANT AUTHORIZATION**

You must complete and submit this enrollment form prior to completing a Salary Reduction Agreement. You must then complete a 457 participation agreement with your school district. Please contact your school district (or, if applicable, your district's third party administrator) 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 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 844-electP2 (844-353-2872) (TTY/TTD users call 800-468-5449) or go online at **Pension2.com**. Customer Service Associates are available Monday through Friday, 6:00 A.M. to 5:00 P.M. Pacific Time (excluding stock market holidays).

## CaISTRS PENSION2 SCHOOL DISTRICT PLAN NUMBERS

Plan #	Plan Name
401807	ALAMEDA COUNTY OFFICE OF EDUCATION
401869	ALBERT EINSTEIN ACADEMY
401755	ALPINE COUNTY UNIFIED
401806	ALVORD UNIFIED
401737	ANTELOPE ELEMENTARY
401765	ARTS IN ACTION COMMUNITY CHARTER
401754	BELLFLOWER UNIFIED
401744	BLACK OAK MINE UNIFIED
401747	BUCKEYE UNION ELEMENTARY
401846	CHAFFEY COMMUNITY COLLEGE DISTRICT
401810	CUESTA COMMUNITY COLLEGE DISTRICT
401761	CONTRA COSTA COMMUNITY COLLEGE DISTRICT
401801	DINUBA UNIFIED
401746	EL DORADO COUNTY OFFICE OF EDUCATION
401745	EL DORADO UNION HIGH
401794	FRANKLIN-MCKINLEY UNIFIED
401803	FOOTHILL DE ANZA COMMUNITY COLLEGE DISTRICT
401104	FULLERTON JOINT UNION HIGH
401743	GOLD OAK UNION ELEMENTARY
401742	GOLD TRAIL UNION ELEMENTARY
401802	HAPPY VALLEY ELEMENTARY
401775	HIGH TECH LA CHARTER
401767	HUMBOLDT COUNTY OFFICE OF EDUCATION
401773	ICEF CHARTER ACADEMY
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
401795	MARYSVILLE JOINT UNIFIED
401778	MOORPARK UNIFIED
401812	MORGAN HILL UNIFIED SCHOOL DISTRICT
401751	MOTHER LODE UNION ELEMENTARY
401848	MT. DIABLO UNIFIED
401796	NEVADA COUNTY CHARTER SERVICES AUTHORITY
401777	NORTH OAKLAND COMMUNITY CHARTER
401797	NOVATO UNIFIED SCHOOL DISTRICT
401779	PARAMOUNT ACADEMY
401749	PLACERVILLE UNION ELEMENTARY
401750	POLLOCK PINES ELEMENTARY
401870	REDDING SCHOOL DISTRICT
401772	RIVER CHARTER SCHOOLS
401738	RIVERSIDE COMMUNITY COLLEGE DISTRICT
401847	ROSEVILLE JOINT UNION HIGH
401756	SAN JACINTO UNIFIED
401785	SAN LUIS COASTAL UNIFIED
401678	SANTA MONICA COMMUNITY COLLEGE DISTRICT
401768	SHASTA UNION HIGH
401776	SILVER OAK HIGH MONTESSORI CHARTER
401852	TAHOE-TRUCKEE UNIFIED
401793	TWIN RIVERS UNIFIED
401752	UNITY SCHOOLS
401868	VENTURA COMMUNITY COLLEGE DISTRICT
401753	YOSEMITE COMMUNITY COLLEGE DISTRICT