

# Employer Information Circular

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## Update on CalSTRS 403bComply

CalSTRS 403bComply provides employers assistance with compliance of comprehensive IRS 403(b) regulations that become effective January 1, 2009.

### Contact CalSTRS Directly

The name of the program, CalSTRS 403bComply, tells you it's provided by your trusted pension system. Because this is a CalSTRS program, you can count on CalSTRS 403bComply to provide the highest quality service. To learn about how CalSTRS can help you with your new 403(b) compliance responsibilities:

- Call toll-free: 888-426-2684
- Visit: [www.CalSTRS.com/tpa](http://www.CalSTRS.com/tpa)
- Email: [403bComply@calstrs.com](mailto:403bComply@calstrs.com)

Concerned about meeting the January 2009 compliance deadline? If you contact CalSTRS 403bComply as soon as possible, in most cases, we will be able to have your district meet the minimum requirements.

### Compliance Services to Meet Your Needs

CalSTRS remains committed to providing you with an affordable and service-driven compliance program. Some of the improvements we are excited to announce are CalSTRS' ability to provide our clients an affordable, service-driven compliance program that offers:

- Streamlined start-up process
- Lower per participant fee
- No monthly minimum for existing clients
- Customer service hours of 8 a.m. to 5 p.m. Pacific time
- Online 403(b) plan enrollments and other plan services for employees

CalSTRS 403bComply will be administered by JEM Resources Partners (JEM), an independent payroll benefits administrator serving school districts and other government agencies.

CalSTRS has contracted with JEM using an interlocal agreement with The Cooperative Purchasing Network (TCPN). TCPN, which is operated by a public agency, is one of the largest purchasing cooperatives in the nation for supplying goods and services to public agencies. Both CalSTRS and TCPN selected JEM through a competitive proposal process.

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As a result of the agreement with TCPN, public school districts, community colleges and other public education agencies can contract with CalSTRS 403bComply through an interlocal agreement. Purchases of services through an interlocal agreement are generally exempt from competitive proposal requirements.