

**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 - START YOUR CONTRIBUTIONS**

**A Salary Reduction Agreement must be completed and submitted to your school district or your district's third party administrator to start your contributions to Pension2.** Please contact your school district (or, if applicable, your district's third party administrator or [403bcompare.com](http://403bcompare.com)) for the appropriate form(s).

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](http://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](http://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).







Plan # School District  
400481 WHITTIER CITY ELEMENTARY  
400482 WHITTIER UNION HIGH  
400483 WILLIAM S. HART UNION HIGH  
401712 WILLIAMS UNIFIED  
401713 WILLITS CHARTER  
401714 WILLOW CREEK ELEMENTARY  
401715 WILLOW GROVE UNION ELEMENTARY  
401716 WILMAR UNION ELEMENTARY  
400883 WILSONA ELEMENTARY  
400819 WINDSOR UNIFIED  
401717 WINSHIP-ROBBINS  
400941 WINTERS JOINT UNIFIED  
401718 WINTON ELEMENTARY  
400484 WISEBURN ELEMENTARY  
400940 WOODLAND JOINT UNIFIED  
401721 WOODSIDE ELEMENTARY  
400820 WRIGHT ELEMENTARY  
401723 YOLO COUNTY OFFICE OF EDUCATION  
400838 YOSEMITE COMMUNITY COLLEGE DISTRICT  
400489 YOSEMITE UNIFIED  
400799 YREKA UNION ELEMENTARY  
400937 YREKA UNION HIGH  
400843 YUBA CITY CHARTER  
400842 YUBA CITY UNIFIED  
400874 YUBA COMMUNITY COLLEGE DISTRICT  
400876 YUBA COUNTY OFFICE OF EDUCATION  
400646 YUCAIPA-CALIMESA JOINT UNIFIED