



How to **transfer balances** from a previous retirement plan to the CalPERS 457 Plan

We can help you consolidate retirement accounts

Please carefully consider the benefits of existing and potentially new retirement accounts and any differences in features. Please note that assets rolled over from other non-457 plans (such as 401(a)/401(k), 403(b), a traditional IRA) may remain subject to the IRS 10% premature distribution penalty tax.

- 1 Start with a statement from your former employer's retirement account.
- 2 Contact Voya's Account Consolidation Team¹ (ACT) at **866-865-2660** to determine which options your account is eligible for and for their assistance with the rollover process.
- 3 Contact the administrator of your previous retirement plan for their rollover distribution requirements. Distributions to the CalPERS 457 Plan should be made payable to:
 - CalPERS 457 Plan, FBO (Your Name)
 - You can direct that the distribution be mailed to you or to Voya.
- 4 Visit calpers457.com to download and complete the *Rollover Contribution Form*, found in the Participant Enrollment Kit. This informs us that funds will be coming from your prior plan(s) and indicates how you would like the amount invested. Send all items to Voya as noted on the form.

Questions & Requests

Call the CalPERS Plan Information Line at **800-260-0659** weekdays between 6:00 a.m. – 5:00 p.m. PT (excluding stock market holidays) for assistance with Plan questions, requests, transactions, and account information. Additionally, your dedicated Account Manager² can assist at **888-713-8244**.

¹ Retirement Consultants are registered representatives of and offer securities through Voya Financial Advisors, Inc. (member SIPC).

² Information from registered Plan Service Representatives is for educational purposes only and is not legal, tax or investment advice. Local Plan Service Representatives are registered representatives of Voya Financial Advisors, Inc., member SIPC.

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