



CalPERS

CalPERS 457 Plan

How to **enroll** in the CalPERS 457 Plan

It's easy
to enroll!

- 1** Visit calpers457.com for Plan details and information on the available investment options.
- 2** Determine the amount or percent you want to contribute on a per pay period basis.
 - Annual Contribution Limit: \$20,500
 - Annual Additional Age 50 or over Catch-Up Limit: \$6,500 (\$27,000 total)
 - Special 457(b) Catch-Up Limit for the 3 years prior to the normal retirement age*: \$20,500 (\$41,000 total)
- 3** Complete the *Employee New Enrollment Form* and the *Beneficiary Designation Form*, following the form instructions carefully. Return both to your Personnel/Payroll Department for processing.
- 4** Register for online account access at calpers.voya.com.
With account access, you can:
 - View, download or print account statements.
 - View, name and change your beneficiary designations.
 - Reallocate account balances.
 - Automatically rebalance allocations to investment options.
 - Download forms.
 - Review Plan rules and features.

Don't put off until tomorrow what you can do today.

Visit calpers457.timetap.com today to schedule an appointment with a local Account Manager who is dedicated to the CalPERS 457 Plan.

* Contact your local Account Manager at 888-713-8244 for qualification requirements.



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

We can help consolidate your assets into your CalPERS Plan!

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 Complete the CalPERS 457 Plan enrollment process.
- 2 Contact Voya's Account Consolidation Team* (ACT) at **866-865-2660** for their assistance and experience with the rollover process.
- 3 Contact the administrator of your previous retirement plan for their rollover distribution requirements. Distributions to the 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 Financial directly.
- 4 Complete and return the *Rollover Contribution Form*, included in the Participant Enrollment Kit. This informs the Plan that funds will be coming from your prior plan(s) and indicates how you would like the amount invested. Send all items to Voya Financial as noted on the *Rollover Contribution 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 NYSE holidays) for assistance with Plan questions, requests, transactions, and account information. Additionally, your local Account Manager can assist at **888-713-8244**.

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