

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: _____

ADDRESS: _____ APT: _____

CITY: _____ STATE: _____ ZIP CODE: _____

PHONE: _____ EMAIL: _____ HIRE DATE: _____

OPTIONAL

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 III¹. 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 III¹.

| | | | |
|--------------------------------------|------------|--|-------------|
| VOYA FIXED PLUS III ¹ | _____ .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% | Total Percent of Investment Allocation Must Equal | 100% |

¹Voya 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**) 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 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**. Customer Service Associates are available Monday through Friday, 8:00 A.M. to 5:00 P.M. Pacific Time (excluding stock market holidays).

CaISTRS PENSION2 SCHOOL DISTRICT PLAN NUMBERS

| Plan # | School District | Plan # | School District |
|--------|---|--------|---|
| 401807 | ALAMEDA COUNTY OFFICE OF EDUCATION | 401954 | MOJAVE UNIFIED |
| 401970 | ALAMEDA UNIFIED SCHOOL DISTRICT | 401944 | MONROVIA UNIFIED |
| 401869 | ALBERT EINSTEIN ACADEMY | 401941 | MONTEREY PENINSULA COLLEGE |
| 401755 | ALPINE COUNTY UNIFIED | 401887 | MONTEREY COUNTY OFFICE OF EDUCATION |
| 401806 | ALVORD UNIFIED | 401778 | MOORPARK UNIFIED |
| 401737 | ANTELOPE ELEMENTARY | 401812 | MORGAN HILL UNIFIED SCHOOL DISTRICT |
| 401966 | ANTELOPE VALLEY UNION HIGH | 401751 | MOTHER LODE UNION ELEMENTARY |
| 401765 | ARTS IN ACTION COMMUNITY CHARTER | 401917 | MOUNTAIN VIEW WHISMAN |
| 401925 | BAYSHORE SCHOOL DISTRICT | 401848 | MT. DIABLO UNIFIED |
| 401754 | BELLFLOWER UNIFIED | 401796 | NEVADA COUNTY CHARTER AUTHORITY |
| 401988 | BIG LAGOON UNION SD | 401757 | NEVADA JOINT UNION HIGH SD |
| 401744 | BLACK OAK MINE UNIFIED | 401951 | NEWCASTLE ELEMENTARY |
| 401992 | BRIDGES CHARTER SCHOOL | 401991 | NORTH COW CREEK |
| 401747 | BUCKEYE UNION ELEMENTARY | 401777 | NORTH OAKLAND COMMUNITY CHARTER |
| 401922 | CABRILLO COMMUNITY COLLEGE DISTRICT | 401797 | NOVATO UNIFIED SCHOOL DISTRICT |
| 401959 | CAMPBELL UNION HIGH SCHOOL DISTRICT | 401914 | OAK GROVE SCHOOL DISTRICT |
| 401938 | CENTER JOINT UNIFIED | 401884 | OJAI UNIFIED |
| 401977 | CERRITOS COMMUNITY COLLEGE DISTRICT | 401964 | PACHECO UNION ELEMENTARY |
| 402004 | CHABOT-LAS POSITAS COMMUNITY COLLEGE DISTRICT | 401962 | PACIFIC GROVE UNIFIED |
| 401918 | CHICO USD | 401986 | PACIFIC VIEW CHARTER SCHOOL |
| 401846 | CHAFFEY COMMUNITY COLLEGE DISTRICT | 401913 | PALO ALTO UNIFIED |
| 401810 | CUESTA COMMUNITY COLLEGE DISTRICT | 401943 | PALOS VERDES PENINSULA UNIFIED |
| 401761 | CONTRA COSTA COMMUNITY COLLEGE DISTRICT | 401779 | PARAMOUNT ACADEMY |
| 401875 | DOWNTOWN COLLEGE PREP | 402009 | PERALTA COMMUNITY COLLEGE DISTRICT |
| 402000 | EAST UNION HIGH SD | 401902 | PASADENA ROSEBUD ACADEMY CHARTER SCHOOL |
| 401746 | EL DORADO COUNTY OFFICE OF EDUCATION | 401749 | PLACERVILLE UNION ELEMENTARY |
| 401745 | EL DORADO UNION HIGH | 401967 | PLEASANT VALLEY SCHOOL DISTRICT |
| 401987 | EUREKA CITY USD | 401750 | POLLOCK PINES ELEMENTARY |
| 401794 | FRANKLIN-MCKINLEY UNIFIED | 401870 | REDDING SCHOOL DISTRICT |
| 401803 | FOOTHILL DE ANZA COMMUNITY COLLEGE DISTRICT | 401772 | RIVER CHARTER SCHOOLS |
| 401920 | FEATHER RIVER CCD | 401738 | RIVERSIDE COMMUNITY COLLEGE DISTRICT |
| 401972 | FOLSOM-CORDOVA UNIFIED | 401847 | ROSEVILLE JOINT UNION HIGH |
| 401989 | FORTUNA UNION ELEMENTARY SD | 402015 | SALINAS UNION HIGH |
| 401990 | FORTUNA UNION HIGH SD | 401903 | SAN FRANCISCO UNIFIED |
| 402008 | FREMONT UNION HIGH SD | 401756 | SAN JACINTO UNIFIED |
| 401104 | FULLERTON JOINT UNION HIGH | 401893 | SAN JOSE UNIFIED |
| 401901 | GALT JOINT UNION HIGH SD | 401785 | SAN LUIS COASTAL UNIFIED |
| 401995 | GILROY UNIFIED | 401916 | SANTA BARBARA USD |
| 401743 | GOLD OAK UNION ELEMENTARY | 401996 | SANTA MARIA-BONITA |
| 401742 | GOLD TRAIL UNION ELEMENTARY | 401678 | SANTA MONICA COMMUNITY COLLEGE DISTRICT |
| 402008 | GONZALES UNIFIED | 401985 | SANTA PAULA USD |
| 401802 | HAPPY VALLEY ELEMENTARY | 401979 | SARATOGA UNION ELEMENTARY |
| 401929 | HAPPY VALLEY UNION ESD (ANDERSON, CA) | 401969 | SHASTA COUNTY OFFICE OF EDUCATION |
| 401767 | HUMBOLDT COUNTY OFFICE OF EDUCATION | 401768 | SHASTA UNION HIGH |
| 401773 | ICEF CHARTER ACADEMY | 401924 | SIERRA JOINT COMMUNITY COLLEGE DISTRICT |
| 401961 | IMPERIAL COUNTY OFFICE OF EDUCATION | 401776 | SILVER OAK HIGH MONTESSORI CHARTER |
| 401947 | INTEGRITY CHARTER SCHOOL | 401994 | SOLANO COUNTY OFFICE OF ED |
| 401963 | JAMESTOWN SCHOOL DISTRICT | 401926 | SONOMA VALLEY UNIFIED |
| 402016 | KERN UNION HIGH | 401978 | STOCKTON UNIFIED |
| 401739 | LAFAYETTE ELEMENTARY | 401982 | SUNNYVALE SCHOOL DISTRICT |
| 401748 | LAKE TAHOE COMMUNITY COLLEGE DISTRICT | 401852 | TAHOE-TRUCKEE UNIFIED |
| 401786 | LATROBE ELEMENTARY | 401952 | TEMPLE CITY UNIFIED |
| 401759 | LODI UNIFIED | 401793 | TWIN RIVERS UNIFIED |
| 401758 | LONE PINE UNIFIED | 401957 | URBAN DISCOVERY ACADEMY |
| 401677 | LOS ANGELES COMMUNITY COLLEGE DISTRICT | 401868 | VENTURA COMMUNITY COLLEGE DISTRICT |
| 401762 | LOS RIOS COMMUNITY COLLEGE DISTRICT | 401980 | VISIONS IN EDUCATION |
| 401872 | LUTHER BURBANK | 401973 | WOODSIDE ELEMENTARY |
| 401894 | MARIN CCD | 401753 | YOSEMITE COMMUNITY COLLEGE DISTRICT |
| 401795 | MARYSVILLE JOINT UNIFIED | 401880 | YUBA CITY UNIFIED |
| 401971 | MERCED COE | | |
| 401908 | MILPITAS UNIFIED | | |
| 401937 | MODESTO CITY SCHOOLS | | |