

Employer Adoption Checklist Coversheet

Below is a listing of documents that are required for the adoption of this Plan. When submitting the executed documents, please fill out and include this **Employer Adoption Checklist** as a coversheet to the documents listed below.

If you have any questions regarding this list or the enclosed forms, please contact us at **800-696-3907**.

Agency Name

CalPERS ID _____

The following documents are included in this packet:

- ▶ **REQUIRED FORMS**
- Board Approved Resolution** *(with original signatures)*
 - Employer Adoption Agreement** *(with original signatures)*
 - New Employer Information Sheet**
 - Optional Provision**
 - Employer Loan Provision**

Please mail your documentation to one of the following addresses:

Standard Delivery:

CalPERS 457 Plan
P.O. Box 942713
Sacramento, CA 94229-2713

Overnight Delivery:

CalPERS 457 Plan
400 Q Street
Sacramento, CA 95811

Thank you for considering the CalPERS 457 Plan as a supplemental savings option for your employees.

Follow these simple steps to adopt the CalPERS 457 Plan today!

STEP 1: Request your governing body to adopt the CalPERS 457 Plan using the **Model Resolution** enclosed in this kit.

STEP 2: Execute a copy of the enclosed **Employer Adoption Agreement**

STEP 3: Complete the **New Employer Information Sheet**

STEP 4: Optional provision:

- **Employer Loan Provision:** If you would like to offer participants the ability to borrow from their plan accounts, then complete the **Employer Loan Provision**.
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STEP 5: Complete the **Employer Adoption Checklist**, enclose the appropriate original fully executed documentation, and mail by standard or overnight mail.

Standard Delivery: (Standard Mail)

CalPERS 457 Plan
P.O. Box 942713
Sacramento, CA 94229-2713

Overnight Delivery:

CalPERS 457 Plan
400 Q Street
Sacramento, CA 95811

If you have any questions about adopting the CalPERS 457 Plan, contact us at **800-696-3907**.

Upon receipt of the executed documents, the Administrator, will:

- Sign the **Adoption Agreement** accepting the Employer into the CalPERS 457 Plan
- Assign an **Employer Plan ID** to confirm participation in the Plan
- Send a **Welcome Kit** that includes:
 - **Confirmation of participation in the Plan**
 - **Instructions of when to begin submitting enrollments and submission of payroll contributions file and payments through myCalPERS**
 - **Copy of all fully executed official documents**
- An Account Manager will contact the Employer to schedule a **New Employer Orientation** and **Employee Presentations**

NOTE: The **Employer Plan ID Number** must be provided on all subsequent transaction requests submitted to the Administrator for processing.