



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

### It's easy to enroll

- 1 Visit [calpers457.com](https://calpers457.com) to review the *Participant Enrollment Kit* for Plan details and information on the available investment options.
- 2 Determine the amount or percent you want to contribute each pay period.

Annual Contribution Limit	\$24,500
Annual Additional Ages 50-59 or 64+ Catch-Up Limit	\$8,000 (\$32,500 total)
Annual Additional Ages 60-63 Catch-Up Limit	\$11,250 (\$35,750 total)
Special 457(b) Catch-Up Limit for the 3 years prior to the normal retirement age <sup>1</sup>	\$24,500 (\$49,000 total)

<sup>1</sup> Contact your dedicated Account Manager at 888-713-8244 for qualification requirements.

- 3 Confirm with your employer that they can process Roth contributions from their payroll if you want to save for retirement on a Roth after-tax basis. You can then visit [calpers457.com](https://calpers457.com) and click **Enroll Now** to enroll in the CalPERS 457 Plan online or download and complete the forms in the *Participant Enrollment Kit*.
- 4 After your contributions to the CalPERS 457 Plan have begun, visit [calpers.voya.com](https://calpers.voya.com) and click **Register Now** to register your account username and password. Log into your account regularly to help stay on track for retirement.

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

Need help with the enrollment process? Visit [calpers457.timetap.com](https://calpers457.timetap.com) or call 888-713-8244 to schedule an appointment with a dedicated Account Manager for the CalPERS 457 Plan.



## 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 Complete the CalPERS 457 Plan enrollment process.
- 2 Contact Voya's Account Consolidation Team<sup>2</sup> (ACT) at **866-865-2660** for their assistance and experience with the rollover process.  
<sup>2</sup> Retirement Consultants are registered representatives of and offer securities through Voya Financial Advisors, Inc. (member SIPC).
- 3 Contact the administrator of your previous retirement plan for their rollover distribution requirements. You can direct that the distribution be mailed to you or to Voya, the recordkeeper for the CalPERS 457 Plan. Distributions to the CalPERS 457 Plan should be made payable to:
  - CalPERS 457 Plan, FBO (Your Name)
- 4 Visit [calpers457.com](https://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.

### We are here to help.

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 Manager can assist at **888-713-8244**.

Plan administration services provided by Voya Institutional Plan Services, LLC. 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).