

CalPERS Supplemental Income 457 Plan Master Forms Matrix



FORM NAME

PURPOSE

REVISION DATE

NEW ENROLLMENT / PARTICIPANT CHANGES

EMPLOYEE NEW ENROLLMENT FORM	<ul style="list-style-type: none"> For New Enrollments only 	09/11
PARTICIPANT CHANGE AUTHORIZATION <small>*Investment fund allocation changes must be made via Plan Information Line or Plan Website **Name and Address Changes must be made through the Employer via the my CalPERS system</small>	<ul style="list-style-type: none"> Increase or decrease contribution amount Suspend contributions Change Marital Status Catch-up Provision 	10/11
BENEFICIARY DESIGNATION FORM	<ul style="list-style-type: none"> Designate beneficiary(ies) 	10/11

TRANSFERS / ROLLOVERS

457 ACCOUNT TRANSFER FORM	<ul style="list-style-type: none"> Transfer balance from another 457 Plan Provider offered by your previous or current Employer into your current CalPERS Supplemental Income 457 Plan 	10/11
ROLLOVER FORM	<ul style="list-style-type: none"> Roll over monies from another type of plan [401(k), 403(b), IRA or 401(a)] from a previous employer 	10/11
DIRECT ROLLOVER REQUEST FORM (optional)	<ul style="list-style-type: none"> Used when a 401(k), 403(b), IRA or 401(a) provider does not provide rollover request form. 	10/11
INTER-PLAN TRANSFER FORM	<ul style="list-style-type: none"> Transfers from a previous employer's CalPERS Supplemental Income 457 Plan into the current employer's CalPERS Supplemental Income 457 Plan 	10/11

DISTRIBUTIONS

DISTRIBUTION REQUEST FORM	<ul style="list-style-type: none"> Request distribution after separation/retirement Change current distribution option Alternate payee distribution per Qualified Domestic Relations Order 	10/11
DEATH DISTRIBUTION FORM	<ul style="list-style-type: none"> For surviving spouse and/or beneficiary(ies) to request distributions (one form per beneficiary) 	10/11
IN-SERVICE WITHDRAWAL / TRANSFER REQUEST FORM	<ul style="list-style-type: none"> In-service transfer for CalPERS Service Credit purchase In-service transfer for another Pension Plan Service Credit purchase Small account withdrawal 	10/11
ROLLOVER REQUEST FORM FOR CalPERS SERVICE CREDIT PURCHASE	<ul style="list-style-type: none"> Rollover all or part of your account to purchase CalPERS service credits after you have permanently separated from your employer. 	10/11
EMERGENCY WITHDRAWAL REQUEST FORM	<ul style="list-style-type: none"> Withdrawal request due to an "unforeseeable emergency" 	10/11

MISCELLANEOUS

THREE-YEAR SPECIAL 457(b)CATCH-UP WORKSHEET	<ul style="list-style-type: none"> Designation of normal retirement age for the purpose of using the Special 457 Catch-up Provision 	10/11
APPLICATION FOR ELECTRONIC DIRECT DEPOSIT	<ul style="list-style-type: none"> Set up electronic direct deposit 	10/11
SEPARATION FROM EMPLOYMENT	<ul style="list-style-type: none"> Completed by Employer when Plan participants permanently separate from employment 	10/11