

CalSTRS403bComply.com Walkthrough

The objective of this piece is to help you navigate CalSTRS403bComply.com and perform necessary tasks in a quick and simple manner. Whether you're a new participant, not having contributed to a 403(b) before or not having been contributing to a 403(b) plan with your current district since before January 1, 2009, or a current participant, whether you've been to the website before or not, you'll find instructions on how to easily navigate the website. There are also instructions regarding how to stop contributions, if you feel like doing so, **as well as how to check your payroll deductions.**

If this walkthrough doesn't answer all of your questions regarding how to navigate CalSTRS403bComply.com, please call us at (888) 892-7494 or e-mail us at 403b@CalSTRS403bComply.com.

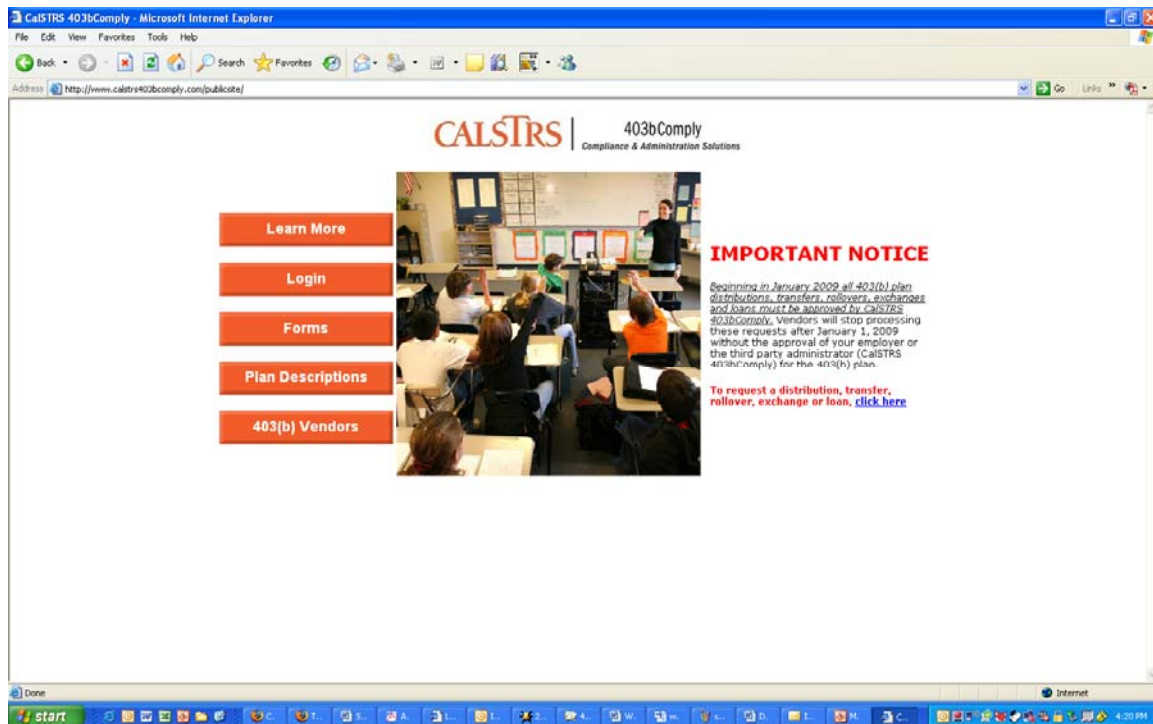
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NEW PARTICIPANTS

If you are not currently contributing to a 403(b) plan or **have not contributed since CalSTRS 403bComply became your plan's administrator** (see the list attached), you are considered a “new participant.”

Go to: www.CalSTRS403bComply.com. It looks like this:



Click on the “Plan Descriptions” button and find your district from the list.

Click on your district’s name and it will take you to a description of that district’s plan. Here’s an example:

CALSTRS | 403bComply
Compliance & Administration Solutions

Allensworth ESD Summary Plan Description

Plan Type Internal Revenue Code Section 403(b)	Plan Administrator CalSTRS 403bComply	Excluded Employees None
Plan Password for Enrolling Online allen403	Written Plan Effective Date 1/1/2009	Plan Year End 12/31
Contribution Tax Treatment Pre-Tax	Contribution Sources Employee	Roth 403(b) Not Available
Contribution Limit	Catch Up Contribution Limit	Automatic Enrollment

Find the password you'll need for your district under the "Plan Password for Enrolling Online" section (the example for Allensworth ESD is "allen403"), and write it down.

Go back to the homepage (www.CalSTRS403bComply.com) and click on "Login."

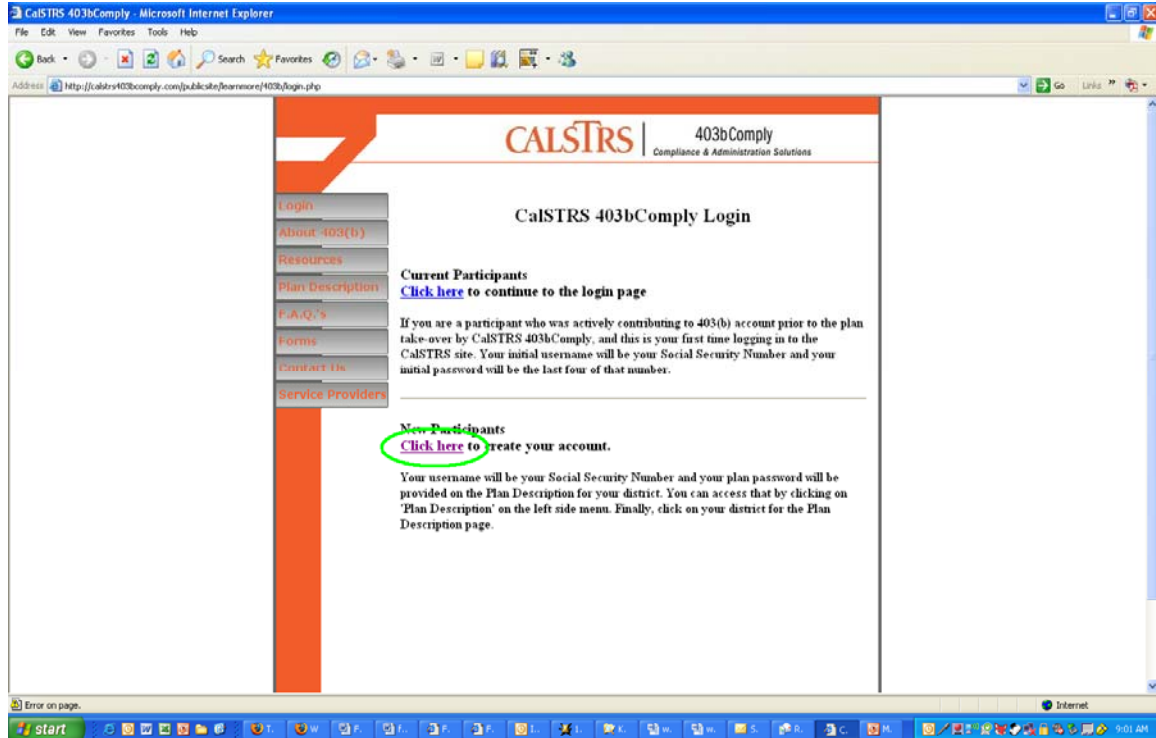
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Learn More
Login
Forms
Plan Descriptions
403(b) Vendors

IMPORTANT NOTICE
Beginning in January 2009 all 403(b) plan distributions, transfers, rollovers, exchanges and loans must be approved by CalSTRS 403bComply. Vendors will stop processing these requests after January 1, 2009 without the approval of your employer or the third party administrator (CalSTRS 403bComply) for the 403(b) plan.

To request a distribution, transfer, rollover, exchange or loan, login to your account on this website. Select the "transactions" tab on the website, click on the type of transaction you are requesting, then follow the instructions on the screen.

Then, click on the “New Participants” link.



It will take you to a login page, asking for your “SSN” and “Password.” Input your nine-digit Social Security Number in the “SSN” field. Remember the “Plan password for enrolling online” you wrote down from the Plan Document for your district (our example was “allen403”)? Input that password in the “Password” field.

Click “Begin.”

You’ll then be taken to a page where you’ll need to input personal information, like name and address. It will look like this:

https://www.yourplanaccess.com/theretirementsolution/genrolleddperson.aspx?REVIEW=true - Microsoft Internet Explorer

Address: https://www.yourplanaccess.com/theretirementsolution/genrolleddperson.aspx?REVIEW=true

The Retirement Solution
Taking the trouble out of paperwork

Enrollment Steps | Summary | Investments | Tools | Log Out | Help

Step 1 of 2: Personal Information

Items marked with an asterisk (*) must be completed before you can proceed to the next step.

Username Information

Establish your Username (6-12 alphanumeric digits, case-sensitive)

Establish your Password (6-8 alphanumeric digits, case-sensitive)

Re-enter Password:

Remember your Username and Password. You will need them to access your account via the plan website in the future.

Lost Password Information

In the event that you lose your Password, please set up the answer to your "Lost Password" verification question.

Verification Question: Alternate password/quote Verification Answer:

Your Personal Information

First Name

Last Name

Date of Birth (mm/dd/yyyy)

Date of hire

When done, click the "Submit" button and it will take you to a review page, giving you a chance to review your information. If all is correct, hit the "Finish" button.

Like the screen below says, you've now created your account with CalSTRS 403(b) Comply.

[Your Account has been Created] - Microsoft Internet Explorer

Address: https://www.yourplanaccess.com/theretirementsolution/genrolledd.aspx

The Retirement Solution
Taking the trouble out of paperwork

Enrollment Steps | Summary | Investments | Tools | Log Out | Help

Congratulations! Your Account has been Created.

The confirmation number for this transaction is: 16476

You may access your account via the plan's website at any time using your Username and Password. If you elected to receive email confirmations, you will receive confirmation of your enrollment at the email address specified.

Reminders:

New Participants will need to:	Current Participants can:
<ul style="list-style-type: none"> Contact an approved Investment Provider and setup an account Select a contribution amount Select one or more Investment Providers 	<ul style="list-style-type: none"> View Current Elections Change Contribution Amounts Change Investment Providers

[Click here](#) to continue and access your account

Now click the “Click here” link to continue and access your account.

This will take you to your “Participant Summary” page. It looks like this:

The screenshot displays the 'Participant Summary' page in Microsoft Internet Explorer. The browser's address bar shows the URL: <https://www.yourplanaccess.com/theretirementsolution/summary.aspx?RAND/OPN/PI-09030519193149349641200LNR=25>. The page features a navigation menu with 'Summary', 'Investments', 'Transactions', 'Tools', and 'Personal Profile'. The 'Personal Info' section for 'Test Participant#00' includes fields for Birth date, Hire date, Entry date, and Marital status (with 'Other' selected). An 'At-a-Glance' box shows 'Account balance: \$0.00' and 'Vested balance: \$0.00'. The 'New Participants' section lists four steps for enrollment, with Step 1 being 'Contact an approved Investment Provider and set up an account'. The 'Current Participants' section provides links for viewing elections, changing contribution amounts, investment providers, and product registration.

Under the “New Participants” section on the left side, Step 1 is to “Contact an approved Investment Provider and set up an account.” If you have not set up a 403(b) account with an approved Investment Provider, proceed no further. Go to the homepage (www.CalSTRS403bComply.com) and click the “403(b) Vendors” button. You may set up a 403(b) account with any of the vendors on this list. Once done, you may continue to Step 2.

Step 2 is where you determine your per-paycheck contribution amount.

Click the “Click here” link under Step 2 and it will take you to this page:

Contributions

Please note that this screen will not indicate your contribution amount. It will show a zero by default.

Any changes submitted will be reflected on your current election report by 10:00 AM the following business day.

If you elect a contribution amount but do not make an Investment Election, your deduction will not be invested; it will go to suspense and be refunded.

[Click here to view your current elections report](#)

[Click here for a deferral calculator](#)

Change Contribution Amounts

Please enter a contribution percentage or dollar amount that your employer will deduct from your compensation each payroll period for deposit to your account.

Rules and Criteria

Change	Contribution Type	Current Contribution	New Contribution	Percent Dollar
<input type="checkbox"/>	Pre-Tax Deferral	Not contributing	0.00 per pay period	Dollar

If you will participate in the 401(k) or 403(b) plan of another employer during this calendar year, how much will you contribute to the other plan this year?

Amount contributed: (calendar year) 0.00

Since you are changing your contribution amount from nothing to something for the first time, be sure to check the “Change” box.

Now, determine how much money you would like to contribute per paycheck and enter it in the “per pay period” field, under “New Contribution.” If you’d like to contribute \$100 per paycheck, enter “100.00” in the field. If you’d like to contribute \$156.21 per paycheck, enter “156.21” in the field.

If you are contributing to a 401(k) plan or 403(b) plan with another employer, input how much money you contribute to both of those plans, per calendar year, in the “Amount contributed: (calendar year)” field. If not, leave it at the default of “0.00.”

When you are comfortable with your contribution amount, hit the “Submit” button.

It will take you to a review page to make sure you’ve contributed the correct amount. If so, hit the “Continue” button.

You’ll then be taken to a “Contribution Rate Change” page, confirming you’ve changed your contribution rate. It will give you a confirmation number, which you may reference in the future, ensuring you’ve changed your contribution amount. There are still two more steps to go, so hit “Click here” to return to the Summary Page.

Step 3 is where you direct your contributions to the Investment Provider with whom you have a 403(b) account.

Click the “Click here” link under Step 3 to go to the Investment Providers page.

If you scroll down just slightly on that page, it will look like this:

Investment Elections
All Sources

You must elect a percent of your payroll deduction to go to an annuity and/or investment vendor in the Plan ("vendor election"), even if 100% goes to one vendor. After you input this percentage, the system will also ask you to fill in a percentage of each vendor election to go to each contract with that vendor. However, we currently do not have the information from the vendors to allow you to elect a percentage to go to different contracts with a vendor. Thus, you should fill in "100%" beside the word "Contract" under each vendor. You must contact the vendor directly to elect how much of your money going to that vendor should go to a particular contract or investment option with the vendor. For more information, please contact us.

To achieve this, do the following:

- Click on "Add Contract" next to the Investment Provider where you would like money to go
- The "(leave this field as marked)" field will already be populated with the word "New". You may leave this as it is.
- Enter "100" in the "Contract Account %" field

Again, this will not affect the elections you have made directly with your investment provider.

Please note that this screen will not indicate your current allocation amounts. It will show zeros by default.

In order to contribute to your 403(b) plan you must have both a valid Investment Election and a current contribution amount (deduction from payroll).

Any changes submitted will be reflected on your current election report by 10:00 AM the following business day.

If you need to view your current elections, you can [click here](#).

CAUTION: Any change you make to your Investment Elections will be effective immediately.

Investment election rules:

Minimum allocation percent:	0.00%
Minimum allocation increment percent:	0.01%

Investment Elections

Investment Provider	New %	(leave this field as marked)	Contract/Account %	Action
403b ASP	0.00			Add Contract
AIG Annuity Insurance Company	0.00			Add Contract

Find the Investment Provider with whom you've set up your 403(b) account. For this example, we'll use 403(b) ASP.

Under "New %," in the same line of your Investment Provider, enter "100.00." This means 100% of your per-paycheck contributions are going to that Investment Provider.

Then, click on the "Add Contract" link in the same line, under the "Action" column. The line will expand to look like this:

CAUTION: Any change you make to your Investment Elections will be effective immediately.

Investment election rules:

Minimum allocation percent:	0.00%
Minimum allocation increment percent:	0.01%

Investment Elections

Investment Provider	New %	(leave this field as marked)	Contract/Account %	Action
403b ASP	100.00			Add Contract
		New	0.00	Remove
403b ASP Total			0.00%	
AIG Annuity Insurance Company	0.00			Add Contract
American Century Investments	0.00			Add Contract
American Fidelity Assurance Co.	0.00			Add Contract
American United Life	0.00			Add Contract
Americo Financial Life and Annuity Insurance	0.00			Add Contract

In the new field created under the “Contract/Account %” column, enter “100.00.” This means you’re only contributing to one contract for the particular Investment Provider.

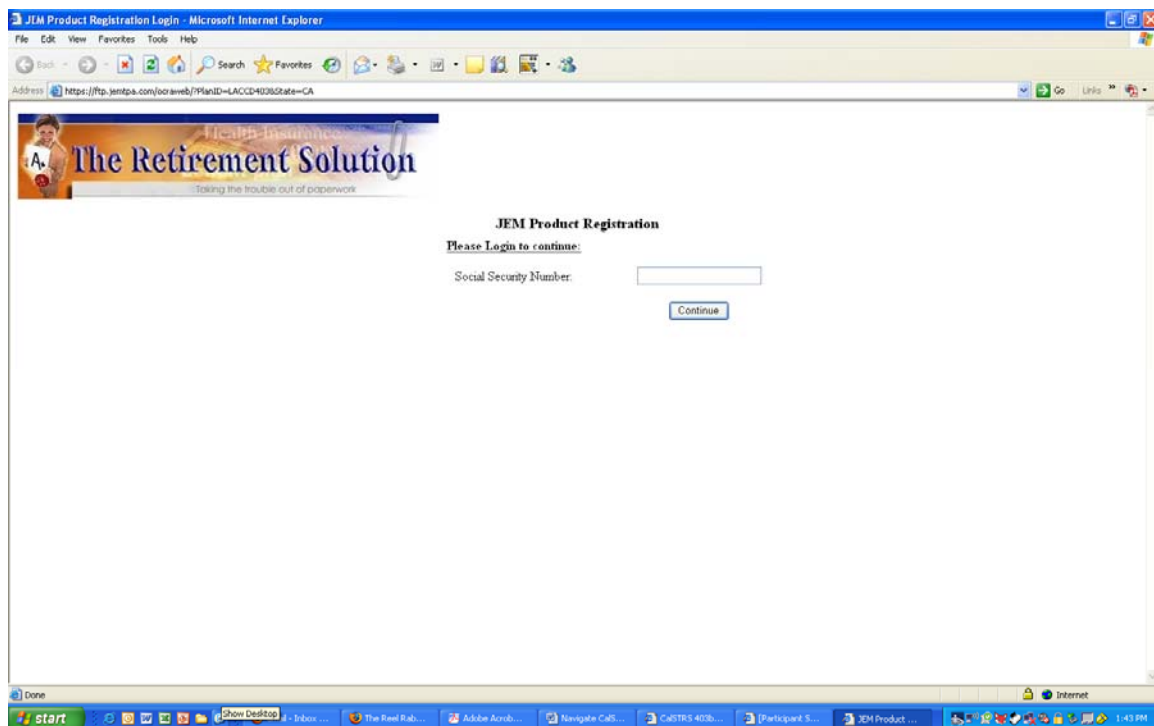
Once you’ve entered your two “100.00’s” in the appropriate fields, scroll to the bottom of the page and hit the “Submit” button.

It will then take you to a review page to make sure you’re contributing to the right Investment Provider. If everything is correct, hit the “Continue” button.

You’ll then be taken to an “Election Change All Sources” page, confirming you’ve changed your Investment Provider. It will give you a confirmation number, which you may reference in the future, ensuring you’ve changed your Investment Provider. There is only one more step to go, so hit “Click here” to return to the Summary Page.

Step 4 is the final step and ensures you’re using an approved Investment Provider.

Click the “Click here” link under Step 4 on the Summary Page, and it will open a new window for you.

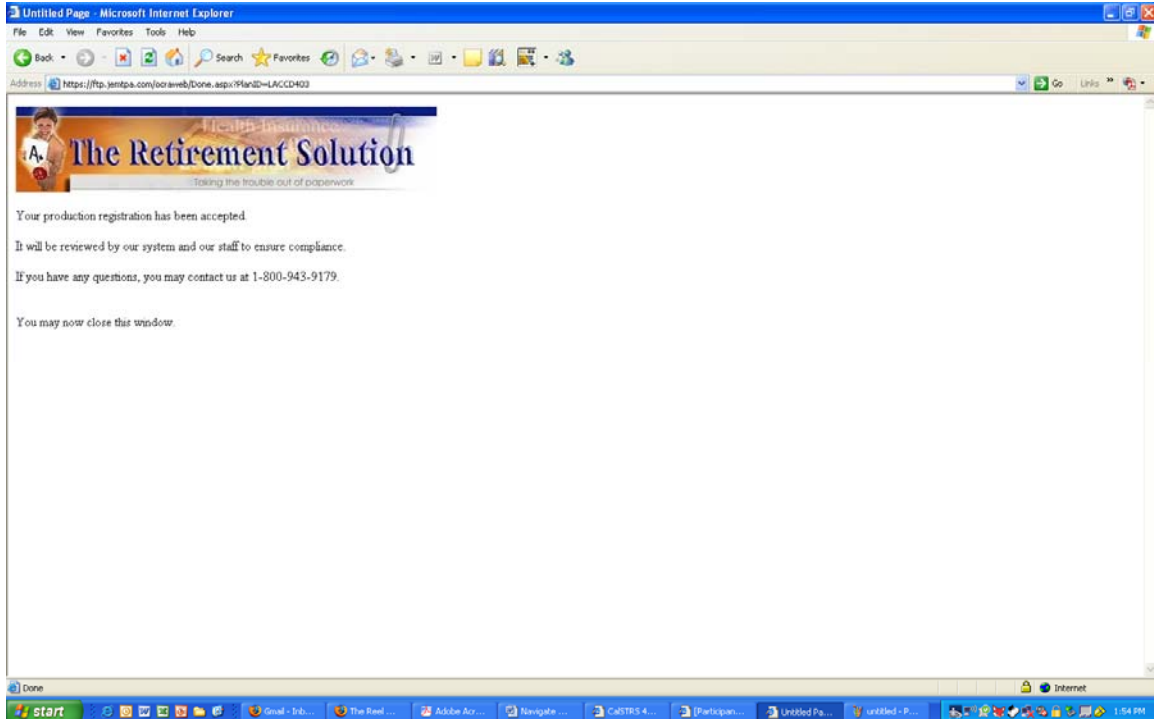


Input your Social Security Number in the appropriate field and hit the “Continue” button.

Click on the “Change Registration” button. Then, click on “Add Product.”

Select the Investment Provider you’ve opened a 403(b) account with from the dropdown list. Then, select the Investment Product you’ve chosen with that particular vendor.

Hit the “Submit” button. Then, hit “Done.” You should then see this screen before you:

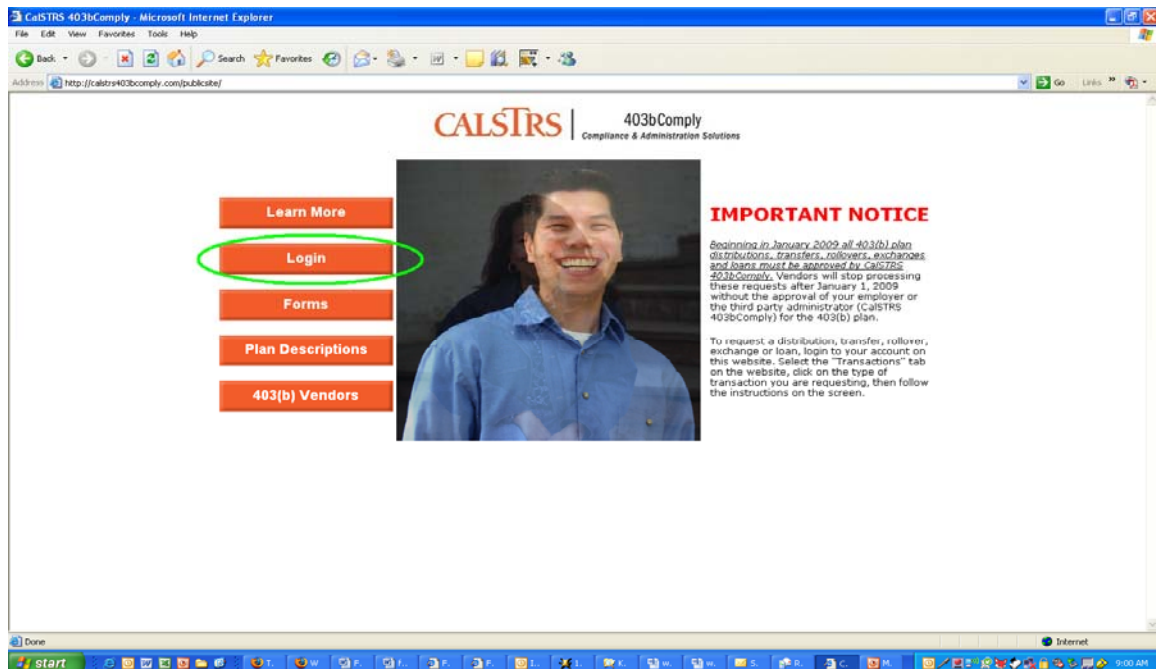


Congratulations. You’ve completed all four steps required to set up contributions to your 403(b) account. From now on, you will follow the steps in the “Current Participants” section of this tutorial to make any changes do your 403(b) contributions.

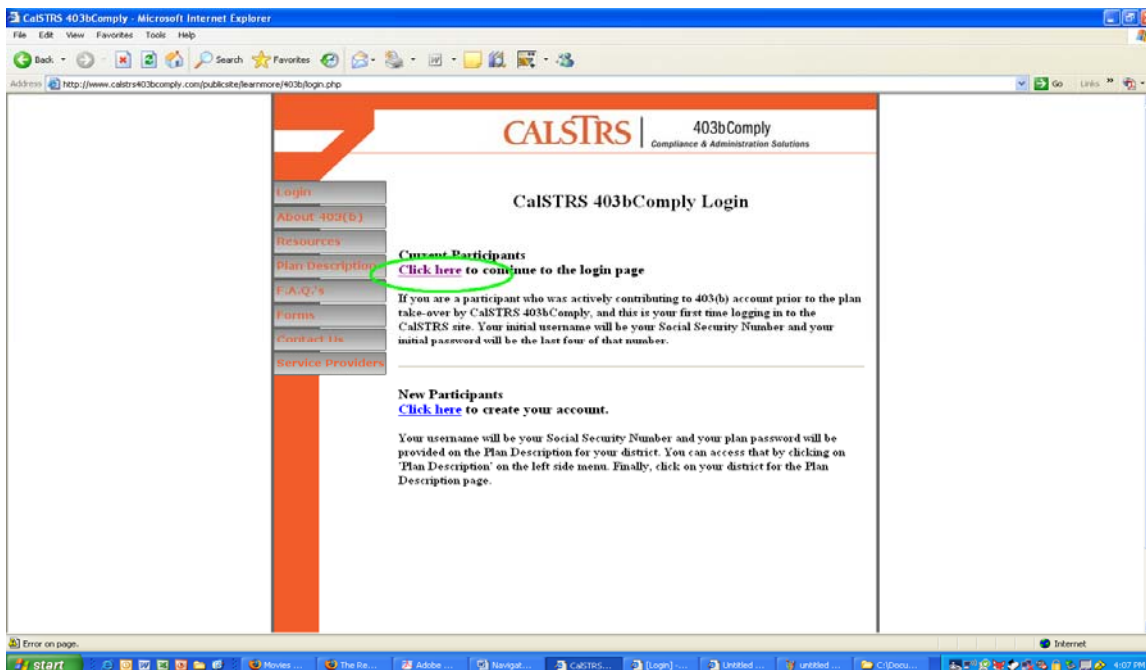
CURRENT PARTICIPANTS

If you are currently contributing to the 403(b) plan through your district or you have ever contributed to the 403(b) plan since CalSTRS took over administration of the plan (see list attached), even if you haven't been to the website before, you are considered a "current participant."

Go to www.CalSTRS403bComply.com and click on "Login."



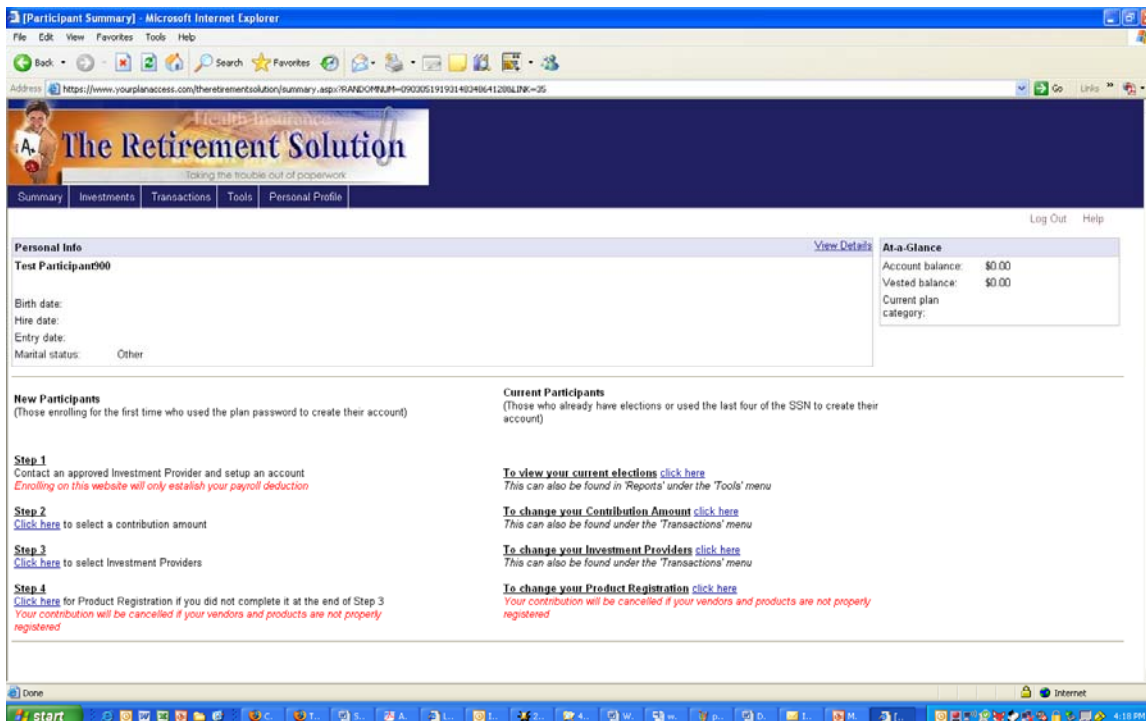
Then, click on the "Current Participants" link:



It will take you to a login page, asking for your “SSN” and “Password.” Input your nine-digit Social Security Number in the “SSN” field. Input the last four digits of your Social Security Number in the “Password” field.

Click “Begin.”

This will take you to your “Participant Summary” page. It looks like this:



Under the “Current Participants” section on the right side, you must choose what action you want to take. If you’d like to change your contribution amount per paycheck, either up or down, click on the “click here” link next to “To change your Contribution Amount.”

It will take you to this page:

The screenshot shows a web browser window with the URL <https://www.yourplanaccess.com/theretirementsolution/contrib.aspx>. The page title is "Contributions" and the site logo is "The Retirement Solution". The main content area contains the following text:

Contributions

Please note that this screen will not indicate your contribution amount. It will show a zero by default.

Any changes submitted will be reflected on your current election report by 10:00 AM the following business day.

If you elect a contribution amount but do not make an Investment Election, your deduction will not be invested; it will go to suspense and be refunded.

[Click here to view your current elections report](#)

[Click here for a deferral calculator](#)

Change Contribution Amounts

Please enter a contribution percentage or dollar amount that your employer will deduct from your compensation each payroll period for deposit to your account.

[Rules and Criteria](#)

Change	Contribution Type	Current Contribution	New Contribution	Percent Dollar
<input type="checkbox"/>	Pre-Tax Deferral	Not contributing	0.00 per pay period	Dollar

If you will participate in the 401(k) or 403(b) plan of another employer during this calendar year, how much will you contribute to the other plan this year?

Amount contributed: (calendar year) 0.00

Buttons:

You’ll notice the red text states even if you’re contributing \$1000 per paycheck, the default number will show 0.00.

Since you are changing your contribution amount, be sure to check the “Change” box.

Now, determine how much money you would like to contribute per paycheck and enter it in the “per pay period” field, under “New Contribution.” If you’d like to contribute \$100 per paycheck, enter “100.00” in the field. If you’d like to contribute \$156.21 per paycheck, enter “156.21” in the field. This will not add or subtract from your current contribution amount. The new number will become your contribution amount.

If you are contributing to a 401(k) plan or 403(b) plan with another employer, input how much money you contribute to both of those plans, per calendar year, in the “Amount contributed: (calendar year)” field. If not, leave it at the default of “0.00.”

When you are comfortable with your contribution amount, hit the “Submit” button.

It will take you to a review page to make sure you’ve contributed the correct amount. If so, hit the “Continue” button.

You'll then be taken to a "Contribution Rate Change" page, confirming you've changed your contribution rate. It will give you a confirmation number, which you may reference in the future, ensuring you've changed your contribution amount.

If you would like to do anything else regarding your contributions, hit "Click here" to return to the Summary Page. If you are through making changes, you may "Log Out." Back at the Summary Page, if you'd like to change the Investment Provider you are contributing to, click the "click here" link next to "To change your Investment Providers."

If you scroll down just slightly on that page, it will look like this:

Investment Election Changes
All Sources

You must elect a percent of your payroll deduction to go to an annuity and/or investment vendor in the Plan ("vendor election"), even if 100% goes to one vendor. After you input this percentage, the system will also ask you to fill in a percentage of each vendor election to go to each contract with that vendor. However, we currently do not have the information from the vendors to allow you to elect a percentage to go to different contracts with a vendor. Thus, you should fill in "100%" beside the word "Contract" under each vendor. You must contact the vendor directly to elect how much of your money going to that vendor should go to a particular contract or investment option with the vendor. For more information, please contact us.

To achieve this, do the following:

- Click on "Add Contract" next to the Investment Provider where you would like money to go.
- The "(leave this field as marked)" field will already be populated with the word "New". You may leave this as it is.
- Enter "100" in the "Contract Account %" field.

Again, this will not affect the elections you have made directly with your investment provider.

Please note that this screen will not indicate your current allocation amounts. It will show zeros by default.

In order to contribute to your 403(b) plan you must have both a valid Investment Election and a current contribution amount (deduction from payroll).

Any changes submitted will be reflected on your current election report by 10:00 AM the following business day.

If you need to view your current elections, you can [click here](#).

CAUTION: Any change you make to your Investment Elections will be effective immediately.

Investment election rules:

Minimum allocation percent:	0.00%
Minimum allocation increment percent:	0.01%

Investment Elections

Investment Provider	New %	(leave this field as marked)	Contract Account %	Action
403(b) ASP	0.00			Add Contract
AIG Annuity Insurance Company	0.00			Add Contract

You'll notice the red text states you will see "0.00" in all fields, by default, even if you're currently contributing to an approved Investment Provider.

Find the new Investment Provider with whom you've set up a 403(b) account. For this example, we'll use 403(b) ASP.

Under "New %," in the same line of your Investment Provider, enter "100.00." This means 100% of your per-paycheck contributions are going to that Investment Provider.

Then, click on the "Add Contract" link in the same line, under the "Action" column. The line will expand to look like this:

CAUTION: Any change you make to your Investment Elections will be effective immediately.

Investment election rules:

Minimum allocation percent: 0.00%
 Minimum allocation increment percent: 0.01%

Investment Elections

Investment Provider	New %	(leave this field as marked)	Contract/Account %	Action
<input type="checkbox"/> 403b ASP	<input type="text" value="100.00"/>			Add Contract
		<input type="text" value="New"/>	<input type="text" value="0.00"/>	Remove
403b ASP Total			0.00%	
<input type="checkbox"/> AIG Annuity Insurance Company	<input type="text" value="0.00"/>			Add Contract
<input type="checkbox"/> American Century Investments	<input type="text" value="0.00"/>			Add Contract
<input type="checkbox"/> American Fidelity Assurance Co.	<input type="text" value="0.00"/>			Add Contract
<input type="checkbox"/> American United Life	<input type="text" value="0.00"/>			Add Contract
<input type="checkbox"/> Americo Financial Life and Annuity Insurance	<input type="text" value="0.00"/>			Add Contract

In the new field created under the “Contract/Account %” column, enter “100.00.” This means you’re only contributing to one contract for the particular Investment Provider.

Please note this will not add another vendor for your contributions to go to, it will rather replace your former vendor and become the new vendor.

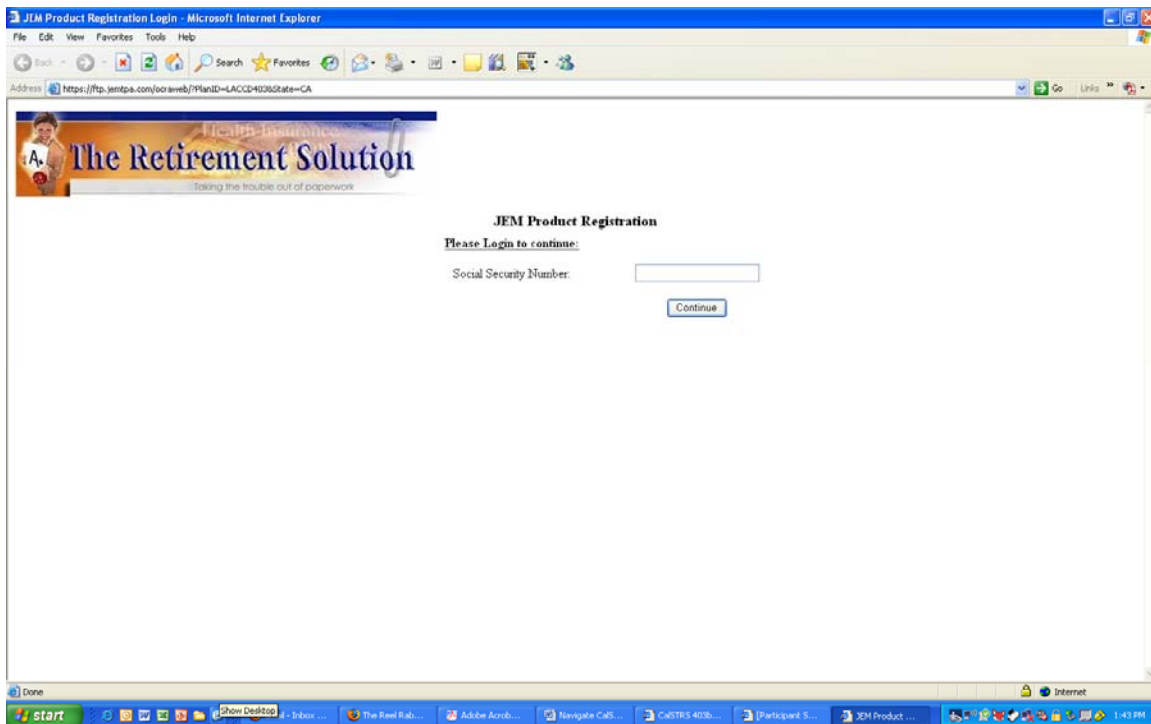
Once you’ve entered your two “100.00’s” in the appropriate fields, scroll to the bottom of the page and hit the “Submit” button.

It will then take you to a review page to make sure you’re contributing to the right Investment Provider. If everything is correct, hit the “Continue” button.

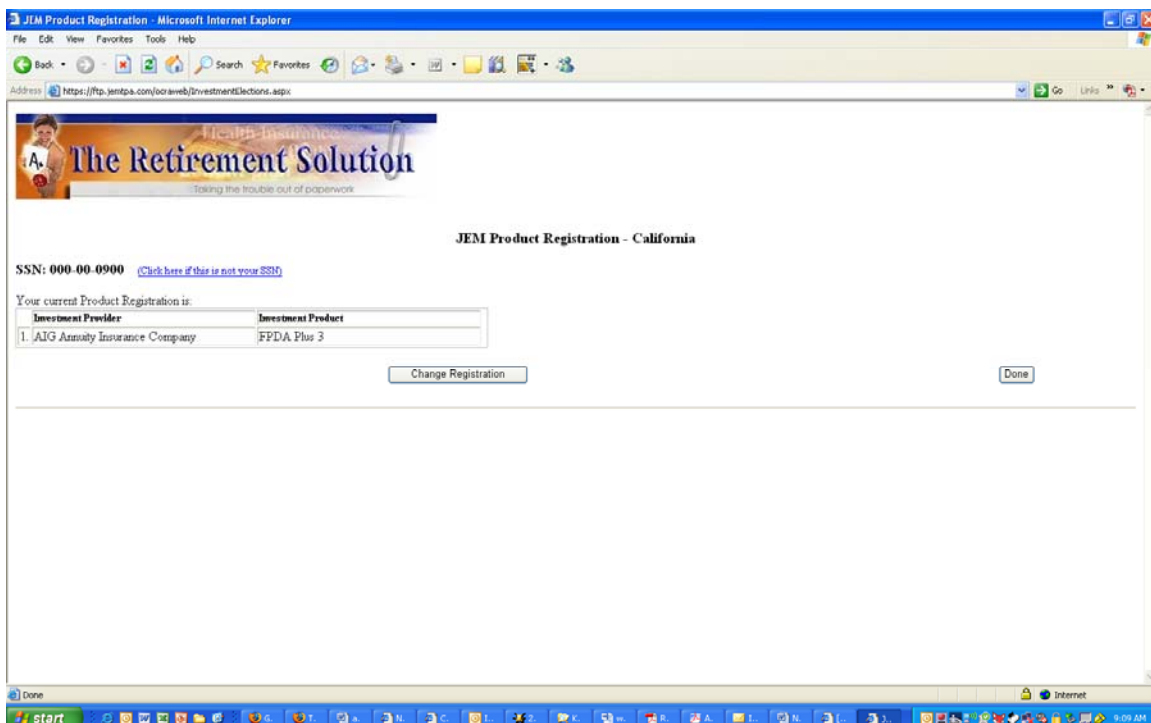
You’ll then be taken to an “Election Change All Sources” page, confirming you’ve changed your Investment Provider. It will give you a confirmation number, which you may reference in the future, ensuring you’ve changed your Investment Provider.

There is one more thing you must do after changing your approved Investment Provider, so hit “Click here” to return to the Summary Page.

You must “change your Product Registration,” so hit the “click here” link next to that phrase, and it will open a new window for you.



Input your Social Security Number in the appropriate field and hit the “Continue” button.

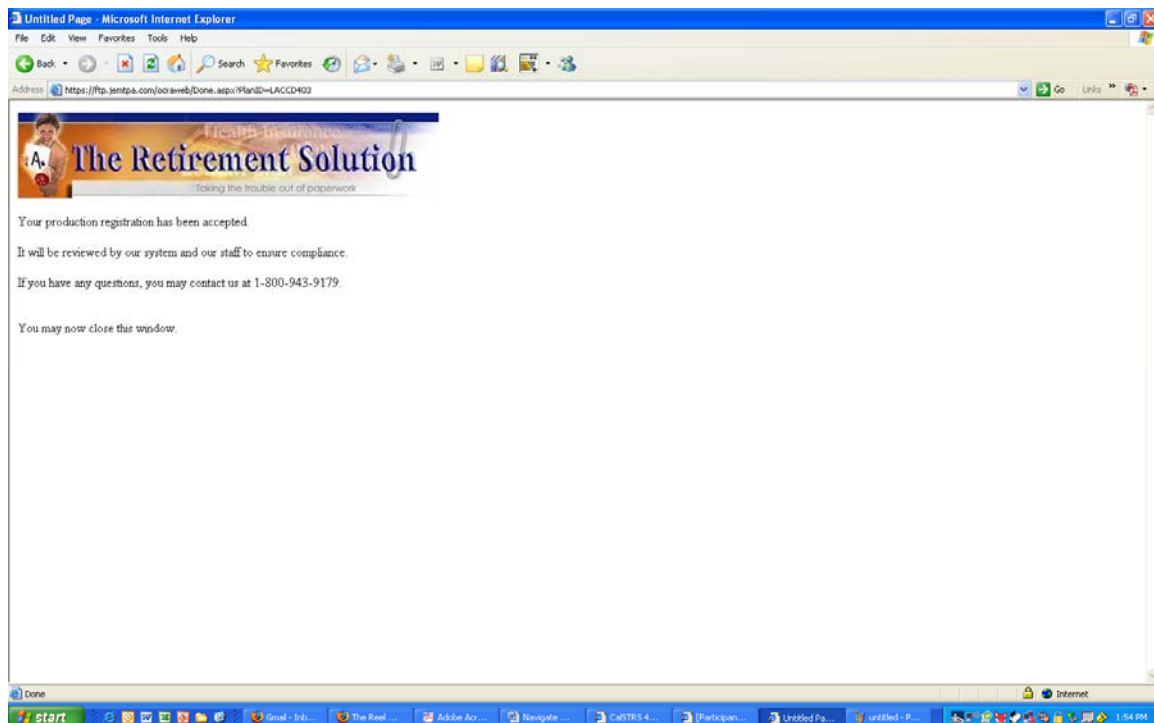


Click on the “Change Registration” button. Then, click on “Add Product.”

Select the Investment Provider you've opened a 403(b) account with from the dropdown list. Then, select the Investment Product you've chosen with that particular vendor.

If have already done Product Registration, you may hit the "Remove" button next to your former Investment Provider.

Hit the "Submit" button. Then, hit "Done." You should then this see screen before you:



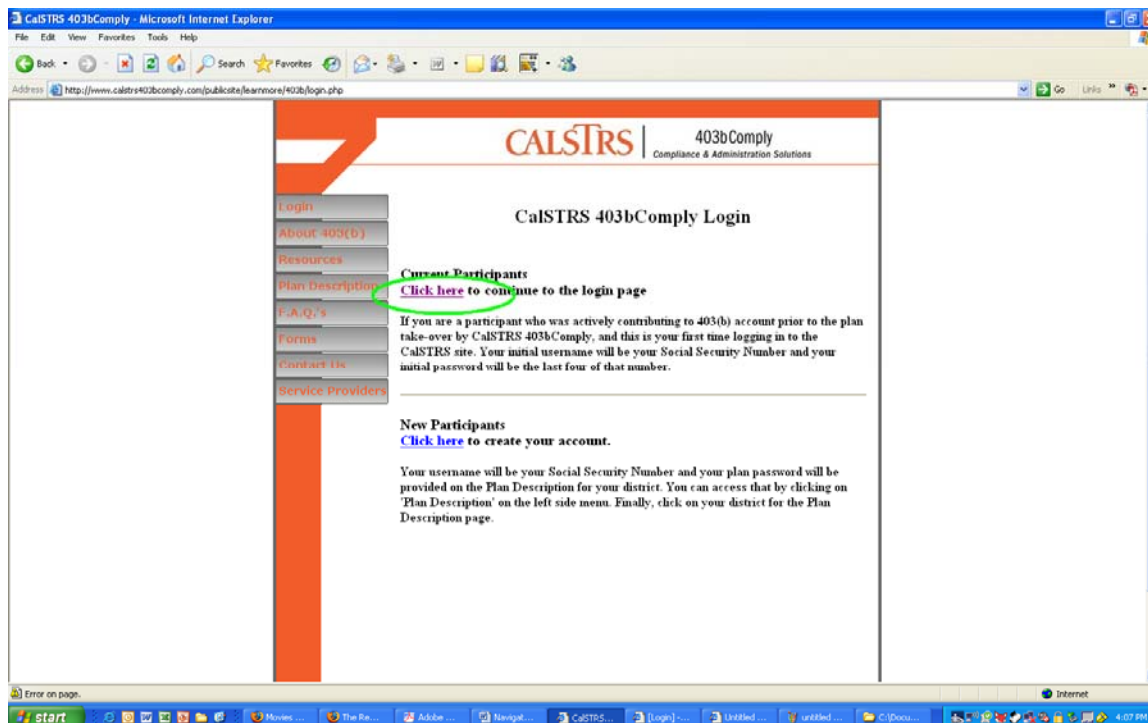
Congratulations. You've successfully changed Investment Providers. You may close the "Product Registration" window and then "Log out."

HOW TO CEASE CONTRIBUTIONS

Go to www.CalSTRS403bComply.com and click on “Login.”



Then, click on the “Current Participants” link:



It will take you to a login page, asking for your “SSN” and “Password.” Input your nine-digit Social Security Number in the “SSN” field. Input the last four digits of your Social Security Number in the “Password” field.

Click “Begin.”

This will take you to your “Participant Summary” page. It looks like this:

The screenshot shows a web browser window titled "[Participant Summary] - Microsoft Internet Explorer". The address bar contains the URL: <https://www.yourplanaccess.com/theretirementsolution/summary.aspx?RANDOMNUM=0900051919314034064120&LINK=25>. The page header includes a logo for "The Retirement Solution" with the tagline "Taking the trouble out of paperwork." and a navigation menu with "Summary", "Investments", "Transactions", "Tools", and "Personal Profile".

The main content area is divided into several sections:

- Personal Info:** Test Participant900. Includes fields for Birth date, Hire date, Entry date, and Marital status (Other). A "View Details" link is present.
- At-a-Glance:** A summary box showing Account balance: \$0.00, Vested balance: \$0.00, and Current plan category.
- New Participants:** (Those enrolling for the first time who used the plan password to create their account)
 - Step 1:** Contact an approved Investment Provider and setup an account. *Enrolling on this website will only establish your payroll deduction.*
 - Step 2:** [Click here](#) to select a contribution amount.
 - Step 3:** [Click here](#) to select Investment Providers.
 - Step 4:** [Click here](#) for Product Registration if you did not complete it at the end of Step 3. *Your contribution will be cancelled if your vendors and products are not properly registered.*
- Current Participants:** (Those who already have elections or used the last four of the SSN to create their account)
 - [To view your current elections click here](#). *This can also be found in 'Reports' under the 'Tools' menu*
 - [To change your Contribution Amount click here](#). *This can also be found under the 'Transactions' menu*
 - [To change your Investment Providers click here](#). *This can also be found under the 'Transactions' menu*
 - [To change your Product Registration click here](#). *Your contribution will be cancelled if your vendors and products are not properly registered*

Under the “Current Participants” section on the right side, click on the “click here” link next to “To change your Contribution Amount.”

It will take you to this page:

The screenshot shows a web browser window with the URL <https://www.yourplanaccess.com/theretirementsolution/contrib.asp>. The page title is "[Contributions] - Microsoft Internet Explorer". The website header includes "The Retirement Solution" logo and navigation tabs: Summary, Investments, Transactions, Tools, Personal Profile. A sidebar on the left lists: Investment Elections, Transfer Funds, Contributions, Withdrawals, Transaction History. The main content area is titled "Contributions" and contains the following text:

Contributions

Please note that this screen will not indicate your contribution amount. It will show a zero by default.

Any changes submitted will be reflected on your current election report by 10:00 AM the following business day.

If you elect a contribution amount but do not make an Investment Election, your deduction will not be invested; it will go to suspense and be refunded.

[Click here to view your current elections report](#)

[Click here for a deferral calculator](#)

Change Contribution Amounts

Please enter a contribution percentage or dollar amount that your employer will deduct from your compensation each payroll period for deposit to your account.

Rules and Criteria

Change	Contribution Type	Current Contribution	New Contribution	Percent Dollar
<input type="checkbox"/>	Pre-Tax Deferral	Not contributing	0.00 per pay period	Dollar

If you will participate in the 401(k) or 403(b) plan of another employer during this calendar year, how much will you contribute to the other plan this year?

Amount contributed: (calendar year) 0.00

Reset Submit

You'll notice the red text states even if you're contributing \$1000 per paycheck, the default number will show "0.00."

Since you are changing your contribution amount, be sure to check the "Change" box.

Since you want to stop contributions, and the number in the "per pay period" field already reads "0.00," you do not need to change anything. The default number will become your contribution amount and effectively stop contributions.

Hit the "Submit" button.

It will take you to a review page, stating you've dropped your contributions to "zero." If so, hit the "Continue" button.

You'll then be taken to a "Contribution Rate Change" page, confirming you've changed your contribution rate to "zero." It will give you a confirmation number, which you may reference in the future, ensuring you've changed your contribution amount.

You may "Log Out."

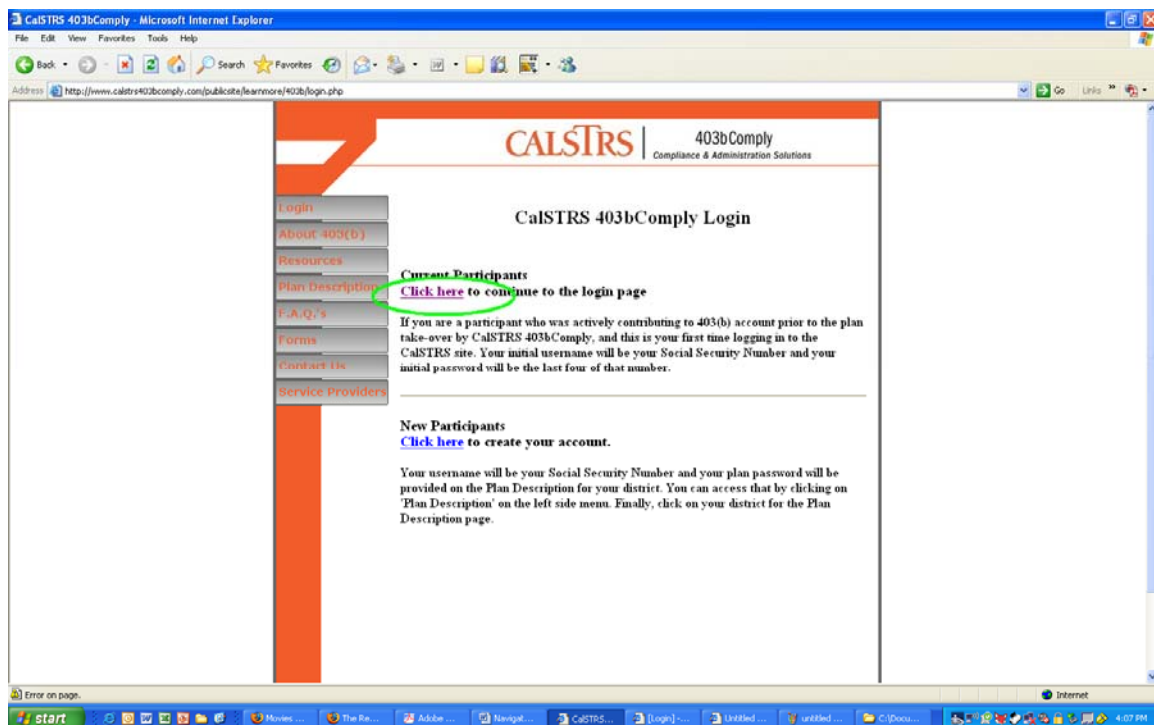
Congratulations, you've successfully stopped all 403(b) contributions, and are welcome to start contributing again at any point in the future.

HOW TO CHECK YOUR PAYROLL DEDUCTIONS

Go to www.CalSTRS403bComply.com and click on “Login.”



Then, click on the “Current Participants” link:



It will take you to a login page, asking for your “SSN” and “Password.” Input your nine-digit Social Security Number in the “SSN” field. Input the last four digits of your Social Security Number in the “Password” field.

Click “Begin.”

This will take you to your “Participant Summary” page. It looks like this:

Under the “Current Participants” section on the right side, click on the “click here” link next to “To view your current elections.”

This will take you to the Reports page. It looks like this:

The Retirement Solution
Taking the trouble out of paperwork

Benefits Summary | Summary | Investments | Transactions | Tools | Personal Profile

Change Plans | Log Out | Help

Reports

Current Participants can view their Current Elections Report by selecting that report from the 'Select report' drop down list, and clicking the 'Submit' button.

The report requires Adobe Reader and will open in a separate window. If you do not have Adobe Reader, you can download it free of charge by following the link below.

Create Reports

Select report group: None | Select report: **403B Current Elections**

Available plan years: 01/01/2009 - 12/31/2009

From date: n/a (mm/dd/yyyy) | To date: n/a (mm/dd/yyyy)

Submit

Refresh

There are no reports available at this time.

Select "403b Current Elections", then click the "Submit" button.

A box will pop up that says Your report is ready to be saved or reviews. Click on the "Open Report" link:

[Reports] - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://www.yourplanaccess.com/theretirementsolution/reports.aspx

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CalSTRS 403bComply [Participant Summary] [Reports]

Benefits Summary | Summary | Investments | Transactions | **Reports** | Change Plans | Log Out | Help

Reports

Current Participants can view their Current Elections Report by selecting that report from the 'Select report' drop down list, and clicking the 'Submit' button.

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Create Reports

Select report group: None | Select report: 403B Current Elections

Available plan years: 01/01/2009 - 12/31/2009

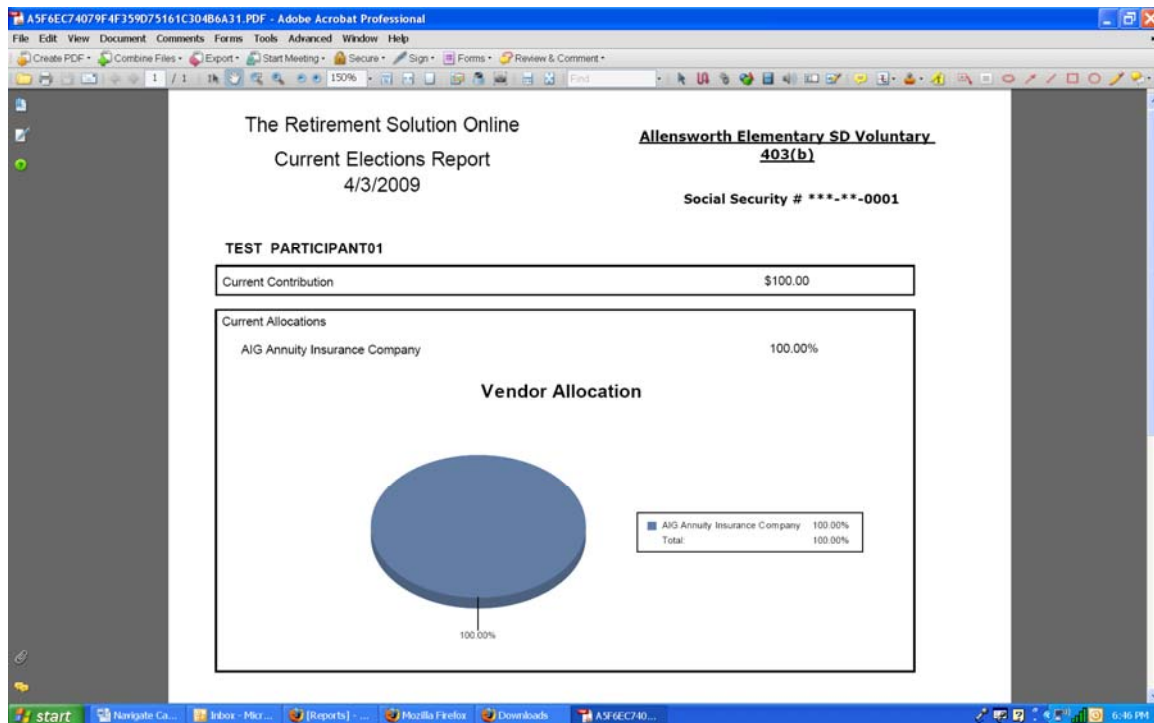
From date: n/a (mm/dd/yyyy) | To date: n/a (mm/dd/yyyy)

Done | www.yourplanaccess.com

Done | www.yourplanaccess.com

start | Navigate Ca... | Inbot - Micr... | [Reports] - ... | Mozilla Firefox | 6:40 PM

A PDF report will appear on your screen showing the amount of your payroll deduction (per pay period) and the 403(b) vendor(s) to which your contributions are going:



Congratulations, you've successfully viewed the current amount of your payroll deductions and the vendor to which your deductions are going.

CalSTRS 403bCompy Employers

Employers who joined the CalSTRS 403bComply program from January 1, 2008 to December 31, 2008:

1. Allensworth 403b
2. Alpaugh 403b
3. Alta Vista 403b
4. Alview-Dairyland 403b
5. Arvin 403b
6. Bass Lake 403b
7. Burton 403b
8. Buena Vista 403b
9. Chawanakee 403b
10. Chowchilla 403b
11. Columbine 403b
12. Cutler Orosi 403b
13. Dinuba 403b
14. Ducor 403b
15. Earlimart 403b
16. Eastern Sierra USD 403b
17. Exeter ESD 403b
18. Exeter HSD 403b
19. Farmersville 403b
20. Goleta 403b
21. Hope ESD 403b
22. Kern HSD 403(b)
23. Kings River 403b
24. Liberty ESD 403b
25. Lindsay USD 403b
26. Lucerne ESD 403(b)
27. Madera COE 403b
28. Woodville Union SD 403b
29. Mammoth 403b
30. Mono County 403b
31. Monson-Sultana 403b
32. Natamoas USD Voluntary 403b
33. Oak Valley ESD 403b
34. Outside Creek ESD 403b
35. Palo Verde Union ESD 403b
36. Pixley SD 403b
37. Pleasant View ESD 403b
38. Porterville USD 403b
39. Raymond 403b
40. Richgrove ESD 403b
41. Rockford ESD 403b

42. Sequoia Union ESD 403b
43. College of the sequoias 403b
44. Sherman Thomas 403b
45. San Lorenzo USD 403b
46. Springville Union SD 403b
47. Stone Corral ESD 403b
48. Strathmore Union ESD 403b
49. Sundale Union ESD 403b
50. Sunnyside Union ESD 403b
51. TCOVE-ROP 403(b)
52. Tulare City ESD 403b
53. Terra Bella Union ESD 403b
54. Three Rivers Union ESD 403b
55. Tipton ESD 403b
56. Tulare COE 403b
57. Tulare COE Child Care 403b
58. Tulare Joint Union HSD 403b
59. Visalia Unified 403b
60. Waukena Joint Union ESD 403b
61. Woodlake Union ESD 403b
62. Woodlake Union HSD 403b
63. Woodville Union SD 403b

If your employer is not listed above, then they joined the CalSTRS 403bComply program after January 1, 2009.