

CalSTRS 403bComply Enrollment Instructions

RECOMMENDED BROWSER FOR A PC IS INTERNET EXPLORER
 RECOMMENDED BROWSER FOR A MAC IS SAFARI

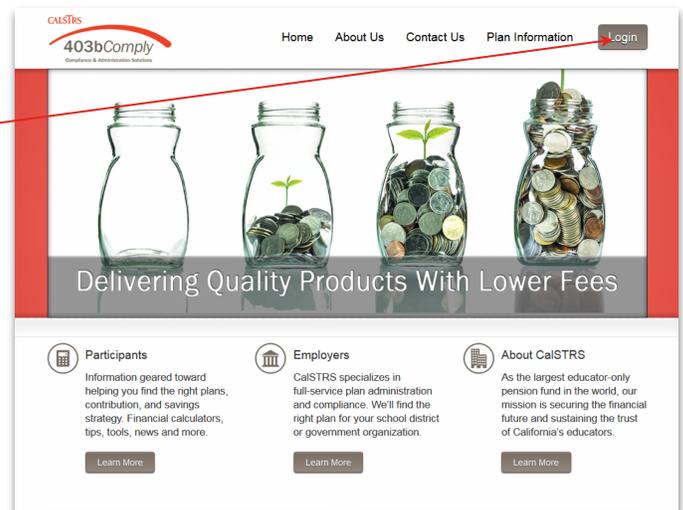
These are instructions for **first time users** creating a CalSTRS 403bComply account. **Existing users** will find this document helpful because the website has been updated, and this will walk you through those new screens.

TRADITIONAL CalSTRS 403bComply: This plan automatically deducts part of your salary into the retirement savings plan before taxes are taken out. The money grows tax-deferred until it's withdrawn, and then the taxes come due.

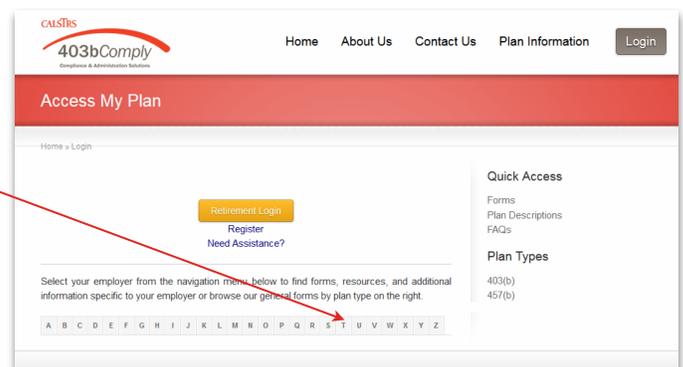
REMINDER: You can have both a traditional and a CalSTRS Roth 403bComply account—and contribute to one or both at the same time—if allowed by your plan.

NEW AND EXISTING USERS, START HERE.

1. Go to www.calstrs403bcomply.com to set up your salary deferral (contribution amount) and allocation. Click **Login**.

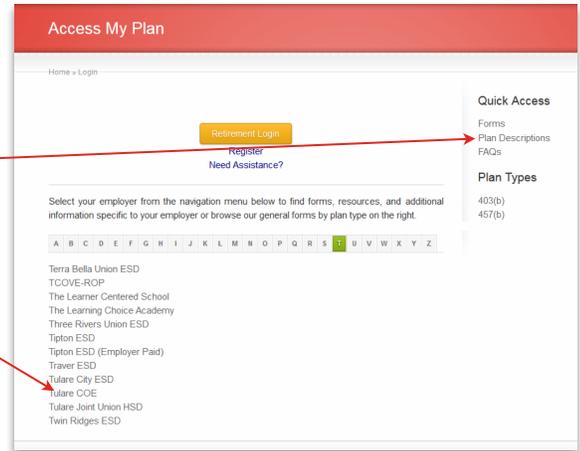


2. From the navigation bar, select the first letter of your district's name. We are using Tulare COE as our example.



3. Select your district's name. We are using Tulare COE as our example.

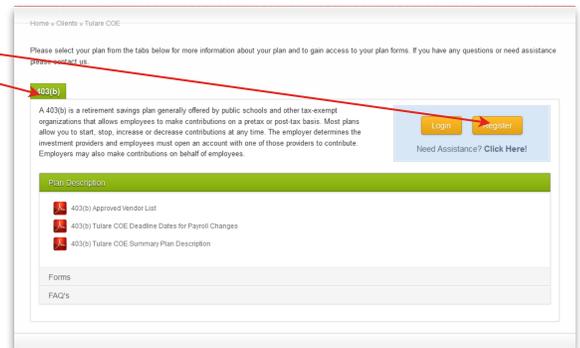
Your Plan Password can be found on the **Plan Description** here.



4A. **NEW USERS** select **403(b)**, then select **Register**.

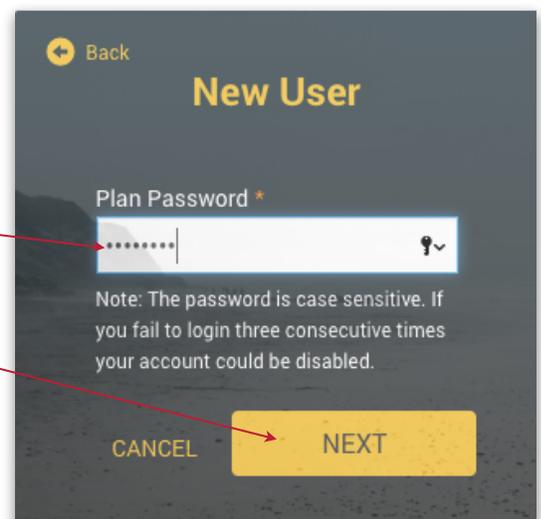
4B. **EXISTING USERS** select **Login**.

Then go to **Step 8 on Page 4**



5. **NEW USERS** enter your (case sensitive) **Plan Password**; click **NEXT**.

(Refer to **Step 3** if you do not know your **Plan Password**.)

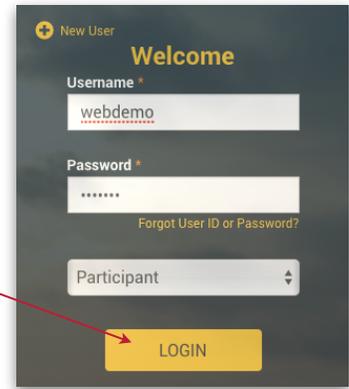


6. Create your Username and Password; enter all personal information; then click **NEXT**.

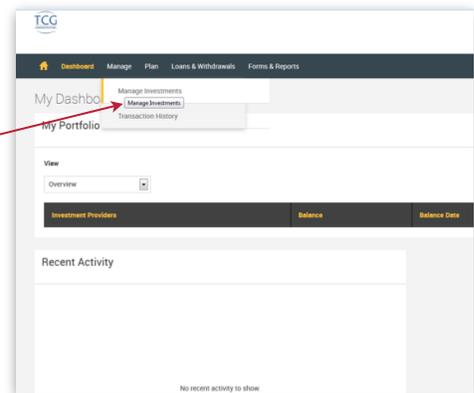
7. Investment Elections—Click **Employee Deferral** to reveal your investment choices.

NEW USERS skip next page. Go to Step 8 on page 5.

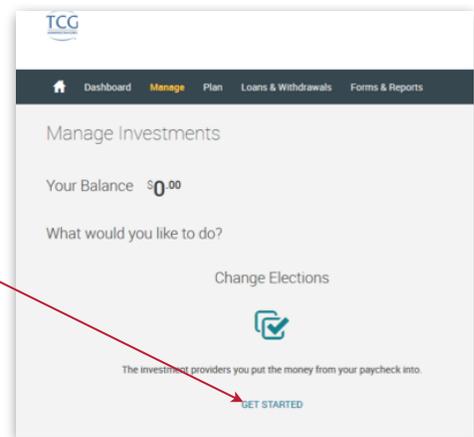
5. **EXISTING** USERS enter your **Username** and **Password**; then select **LOGIN**.



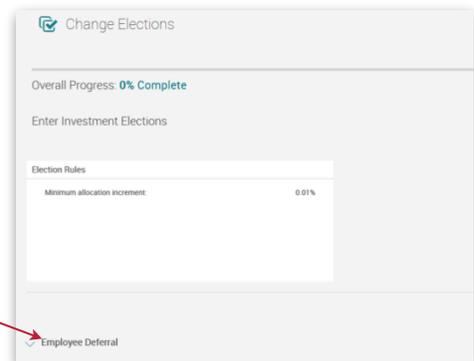
6A. Click **Manage Investments** to view or change your current elections.



6B. This screen reveals your current 403(b) investment choices. To change amounts or vendors, click **GET STARTED**.



7. Now click **Employee Deferral** to reveal all 403(b) investment funds offered.



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Dashboard Forms & Reports Plan Selection

Select Investments

Overall Progress: 50% Complete

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

CAUTION: Changes you make to your investment elections take place immediately. Changes to your Total Election Amount Deducted per Pay Period take place after being processed by your employer. The new deduction per pay period you enter will replace the current deferral amount completely.

CAUTION: If you elect a percentage deduction, the percent you elect will be the percent deducted per pay period. (a total election of 50% = one half of your paycheck)

> Investment Provider Elections

Employee Deferral

Investment Provider	Current IP Election	New IP Election
American Century Investments	\$0.00	\$ 0.00
American United Life	\$0.00	\$ 0.00
Americo Financial Life and Annuity Insurance	\$0.00	\$ 0.00
Annuity Investors Life Insurance (Great American)	\$0.00	\$ 0.00
Aspire Financial	\$0.00	\$ 0.00
AXA Equitable Life Insurance	\$0.00	\$ 0.00
CM Life	\$0.00	\$ 0.00
Columbia Funds	\$0.00	\$ 0.00
Commonwealth Annuity	\$0.00	\$ 0.00
FAM Funds	\$0.00	\$ 0.00
Federated Funds	\$0.00	\$ 0.00
Fidelity Security Life Insurance Company	\$0.00	\$ 0.00
First Investors	\$0.00	\$ 0.00
Franklin Templeton Investments	\$0.00	\$ 0.00
GWN Securities Inc.	\$0.00	\$ 0.00
Horace Mann	\$0.00	\$ 0.00
Industrial Alliance Pacific	\$0.00	\$ 0.00
ING Life Insurance and Annuity Company	\$0.00	\$ 0.00
ISC Group	\$0.00	\$ 0.00
Jefferson National Life Insurance Company	\$0.00	\$ 0.00
Legend Group Inc.	\$0.00	\$ 0.00
Life Insurance Company of the Southwest	\$0.00	\$ 0.00
Lincoln Financial Group	\$0.00	\$ 0.00
Lincoln Investment Planning Inc.	\$0.00	\$ 0.00
Met Life	\$0.00	\$ 0.00
Midland National Life Insurance Company	\$0.00	\$ 0.00
Modern Woodmen of America	\$0.00	\$ 0.00
New York Life Insurance and Annuity Corporation	\$0.00	\$ 0.00
North American Co for Life and Health Insurance	\$0.00	\$ 0.00
Oppenheimer Funds Distributor	\$0.00	\$ 0.00
Pentegra Retirement Services	\$0.00	\$ 0.00
PlanMember Svcs Corp.	\$0.00	\$ 0.00
Putnam Investments	\$0.00	\$ 0.00
RiverSource Investments	\$0.00	\$ 0.00
Rydex Investments	\$0.00	\$ 0.00
Security Benefit	\$0.00	\$ 0.00
Sentinel Group Funds	\$0.00	\$ 0.00
Symetra Life Insurance Company	\$0.00	\$ 0.00
T Rowe Price Trust Company	\$0.00	\$ 0.00
The Vanguard Group	\$0.00	\$ 0.00
Thrivent Financial for Lutherans	\$0.00	\$ 0.00
Transamerica Life Insurance Co	\$0.00	\$ 0.00
USAA Life Insurance Company	\$0.00	\$ 0.00
Vallco	\$0.00	\$ 0.00
Voya Financial	\$0.00	\$ 0.00
Waddell & Reed	\$0.00	\$ 0.00
Western National Life Insurance Company	\$0.00	\$ 0.00
	\$0.00	\$0.00

I authorize the investment election changes to this money source

RESET TABLE

BACK NEXT

8. Next apply the dollar amount of your contribution to the investment(s) of your choice. Once you are satisfied with your choices and your total at the bottom of the page equals your per-paycheck deduction, click the **I authorize** box.

Then click **NEXT**.

9. Review all entries. Make any changes using the **Edit** buttons.

Click **SUBMIT** when you are satisfied.

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Dashboard Forms & Reports Plan Selection

Enrollment steps Print

Overall Progress: **66% Complete**

Confirm & Submit

If your enrollment information is correct, click below to submit your enrollment request.

Please Note:

This submission will not create an account with the Investment Providers. By completing this election, you agree to the terms of the electronic salary reduction agreement, that can be viewed by [clicking here](#)

Username: testusername
 First name: TestUserFirst
 Last name: TestUserLast
 Street address 1: 3333 Test Street
 Street address 2:
 City: Test City
 State: TX
 Zip code: 77777
 Country: USA
 Date of birth: 05/11/2000
 Date of hire: 08/12/2015

Home phone: (512) 600 - 5000
 Office phone: (512) 600 - 6000 Ext
 Other phone: (512) 600 - 7000
 Home email address: testuser@gmail.com
 Other email address:
 Office email address:
 Send email confirmation to: Home

Security Question

Security Question 1
 What is your pet's name?
 Answer 1
 Mopei

Investment Elections

Employee Deferral

All future contributions to the source will be invested as follows:

AXA Equitable Life Insurance : \$25.00
 Jefferson National Life Insurance Company : \$25.00
 Life Insurance Company of the Southwest : \$10.00
 PlanMember Svcs Corp. : \$35.00
 Rydex Investments : \$25.00
 Transamerica Life Insurance Co : \$60.00

If your enrollment information is correct, click below to submit your enrollment request.

SUBMIT

10. Well done! You are finished! Your six-digit Confirmation Number will be emailed to you.

Please note: Your contribution may be cancelled if you have not set up an account with the vendor(s). To review your vendor registrations, **click here**.

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Dashboard Forms & Reports Plan Selection

Enrollment steps Print

Overall Progress: **100% Complete**

Congratulations! Your Account has been Created. The confirmation number for this transaction is: 348162

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:

Your contribution may be cancelled if your Vendors and Products are not properly registered. To review your Product Registration, [click here](#).