



- New Enrollment    
  Deferral Change    
  Name/Address Change    
 (Check all that apply)

INSTRUCTIONS

- Step 1:** Complete sections I and II.  
**Step 2:** Section III (A): Decide the dollar amount or percentage of pay you would like to contribute per pay period.  
**Step 3:** Section III (B): Choose your investments. Select the one Target Retirement Fund closest to your retirement date or select a mix of core and risk-based fund offerings.  
**Step 4:** Sign this form and the beneficiary form and return to your Personnel/Payroll Department.

**I. Participant Information**

Participant Name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Former Name, if applicable \_\_\_\_\_ Date of Birth \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Work Telephone \_\_\_\_\_ Home Telephone \_\_\_\_\_ Email Address \_\_\_\_\_

**II. Employer Information**

Employer Name \_\_\_\_\_ Employer Plan Number \_\_\_\_\_

**III. Deferral Information**

**A. Deferral Election** Indicate the dollar amount or percentage of pay you wish to defer into the CalPERS 457 Program per pay period. Your Deferral will commence in the month following the date on which you make this deferral election.

- I elect to defer \$ \_\_\_\_\_ OR % \_\_\_\_\_ from my salary per pay period effective  Next available pay period  Specific Date \_\_\_/\_\_\_/\_\_\_  
 I elect to change my deferral from \$ \_\_\_\_\_ OR % \_\_\_\_\_ Per Pay Period to \$ \_\_\_\_\_ OR % \_\_\_\_\_ effective  Next available pay period  Specific Date \_\_\_/\_\_\_/\_\_\_  
 I elect to suspend deferrals to \_\_\_\_\_ effective  Next available pay period  Specific Date \_\_\_/\_\_\_/\_\_\_

(Complete ONLY if you are eligible to use either one of the catch-up methods below and you are electing to do so. You may use one but not both during the same tax year)

- I will be age 50 or older in the current tax year and am using the Age 50 Catch-up method  
 I am using the Special 457 Catch-up. I have also completed the separate form entitled "Declaration of Normal Retirement Age/Special 457 Catch-up Method Worksheet".

**B. Investment Allocation of Deferral** Indicate below the deferral amount that you want allocated among the Plan's investments. Your current and future deferrals will be invested according to the allocation percentages you enter below. Allocations must equal 100%. If investment allocation instructions are not provided or your instructions are unclear, the administrator will allocate the assets to the appropriate Target Retirement Fund.

**Target Retirement Date Funds**

- 31 SSgA Target Retirement Income Fund \_\_\_\_\_
- 32 SSgA Target Retirement 2010 Fund \_\_\_\_\_
- 33 SSgA Target Retirement 2020 Fund \_\_\_\_\_
- 34 SSgA Target Retirement 2030 Fund \_\_\_\_\_
- 35 SSgA Target Retirement 2040 Fund \_\_\_\_\_

**Risk-Based Funds**

- 80 SSgA Conservative Asset Allocation Fund \_\_\_\_\_
- 84 SSgA Moderate Asset Allocation Fund \_\_\_\_\_
- 88 SSgA Aggressive Asset Allocation Fund \_\_\_\_\_

**Core Funds**

- 20 SSgA Stable Fixed Income Fund \_\_\_\_\_
- 36 CalPERS Treasury Inflation Protected Securities Fund \_\_\_\_\_
- 37 CalPERS Total Return Bond Fund \_\_\_\_\_
- 40 CalPERS S&P 500 Equity Index Fund \_\_\_\_\_
- 39 AllianceBernstein Active Large Cap Equity Value Fund \_\_\_\_\_
- 38 Turner Active Large Cap Equity Growth Fund \_\_\_\_\_
- 41 CalPERS Small & Mid Cap Equity Index Fund \_\_\_\_\_
- 42 CalPERS International Index Fund \_\_\_\_\_
- 43 SSgA Select Active International Fund \_\_\_\_\_



**IV. Signatures**

I authorize my employer to deduct from payroll the amounts indicated above for deferral into the CalPERS 457 Program. I understand that the elections and/or designations I have authorized above will remain in force until I authorize a change in accordance with the provisions of the Plan.

Participant's Signature \_\_\_\_\_ Date \_\_\_\_\_

Employer's Signature \_\_\_\_\_ Date \_\_\_\_\_